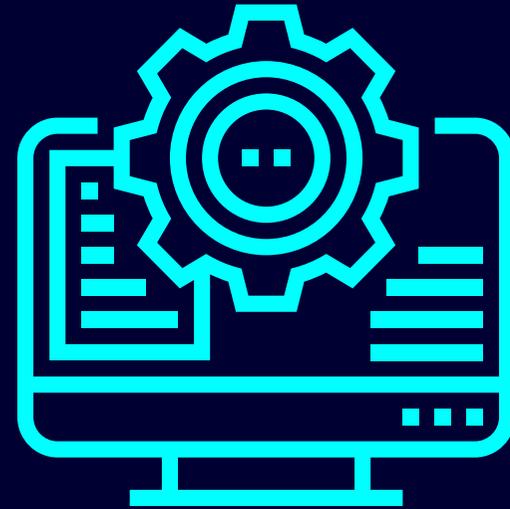


# *Time to scrap the spreadsheets?*

**be the  
business**

Let us help you choose the  
right software to improve  
productivity and fuel growth

An impartial and practical  
primer for SMEs



# What's in this guide?

- Part 1**  
Why is buying software such a big deal?
- Part 2**  
Do I really need new software?
- Part 3**  
Sob story to success story: 5 mini case studies
- Part 4**  
How do I choose the right software?
- Part 5**  
Your software shopping list
- Part 6**  
Summary: buying with confidence

## Who is this guide for?

If you're a big business with a big budget and a big IT department, this guide is not for you. This guide is for you if you are:



Juggling more spreadsheets than you can shake a stick at



Slightly overwhelmed by the amount of software out there in the marketplace



Confused by and suspicious of all the vendors promising you the earth



Interested in choosing the right software for the right reasons at the right price



And if you've already had your fingers (and budget) burned by choosing software that didn't deliver on its promise, this guide is for you too. Because with a little more support and structure, it could be the best choice you ever made.

## Who is this guide from?

Be the Business is a small, not-for-profit organisation dedicated to boosting productivity among UK businesses.

We're doing it by helping leaders in small and medium-sized firms do what you do best: improve, innovate and inspire. We aren't selling you anything. We're not in cahoots with vendors.

Our content doesn't carry ads or sponsors. There's no catch. We just want to help.

# Why is buying software such a big deal?



It's not rocket science, but it does takes time.

**If you want to grow your business, get more efficient or just spend less time fiddling with spreadsheets, you might be thinking of investing in some new software.**

But which kind do you need, how do you justify the cost and where do you start? We created this guide to walk you through a few of those questions and maybe help you scrap a spreadsheet or two.

But why is choosing the right software such a minefield for small businesses?

Well first of all, there's the challenge of cutting through all the marketing noise, figuring out how products are different from each other and checking the wild claims in the sales blurb.

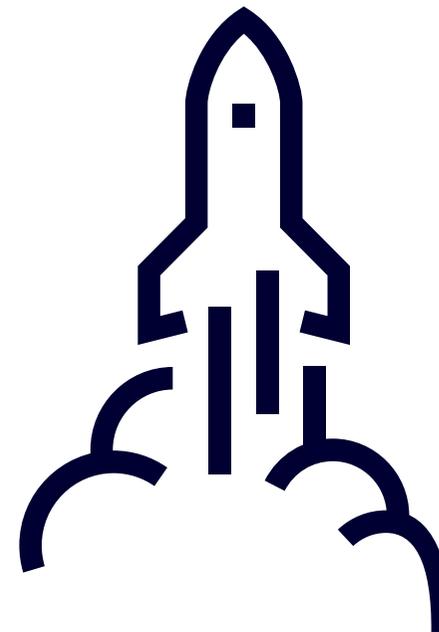
But even if you could believe everything salespeople tell you, choosing software would still be a nightmare. You don't have a bottomless budget, you're busy and probably out of your comfort zone.

But.

If you choose wisely, even a small investment can bring big benefits. You'll probably grow, you should save time, and you'll definitely get out from behind that big pile of paperwork. The right tool can even help you spot exciting new opportunities in your customer base or supply chain.

## We spoke to lots of business owners like you

We spent time with more than 80 small and mid-sized business owners who recently decided to invest in a new system or software. They told us why they chose to buy software, how it helped (sometimes), how they got their fingers burnt (often) and what tips they have for you now. They say it's not rocket science, but it does takes time.



## Part 2:

# Do I really need new software?

**To answer this you first need to decide what you want software to do. Which problem would you want it to solve? Which goal would you want it to achieve?**

It's worth taking a moment to check if technology really is the best way to achieve the goal/fix the problem. We spoke to quite a few business owners who had dived into buying new technology but felt, in retrospect, it wasn't the right move. We love the benefits that software can bring, but it's not always the right solution. There might be cheaper, simpler ways of achieving the same objective. For example:

- Do you need to automate, or do you just need to tweak a process?
- Do you need new software, or do you just need faster computers?
- Do you need people to use new tools or do they just need a bit of extra training?

Once you've identified the thing you want it to do, it's worth then considering what the future might look like. Without a clear vision for what you want to happen, you won't know when you've achieved it.

You already know your business and you know where you're heading. But having a specific objective for new software is essential for making the right choice. And when salespeople are promising you the earth, you can use this to check whether the thing they are offering is something you actually want.

For example:

- We need to get invoices out there faster to speed up cash flow
- We need to spend less time on HR admin now we've got more people
- My inbox is rammed, we need a better way to share and store documents
- We need to co-ordinate the way we communicate with clients
- We need to get better at making delivery deadlines
- We need to process more orders in a day without paying so much overtime



In this guide, we're focusing on software for three key business areas: sales & marketing, HR and accounting. The business owners we spoke to said getting away from spreadsheets in these areas had brought them the best improvements in productivity. Here's a quick explainer for each and a few objectives you might want to keep in mind.

### Sales, marketing & customer service software

Customer relationship management (CRM) software tracks and manages your relationships and interactions with existing and potential customers. It also stores your customer data centrally so everyone can see customer records and quickly find contact information, order history or details of previous interactions. Some CRM software allows you to schedule marketing activity and set reminders.

Could be good if you...

- Want to analyse your customers according to location, demographic, or buying preferences
- Rely on emails, sticky notes, spreadsheets and manual processes to follow up leads
- Need to keep a closer eye on key sales metrics to motivate or reward your sales team
- Are keen to see which sources are driving the most sales and tweak your campaigns or website
- Want to keep track of what's been said to customers by which team members and when
- Have a long sales cycle and want to keep track of prospects in the pipeline

### HR management & payroll software

HR software stores your employee data and automates your manual HR processes. It usually carries out repetitive tasks like payroll, timesheets, calculates time-off, onboarding and performance management. It frees you and your managers from admin, and it might mean you don't need to hire specialist HR resources.

Could be good if you...

- Would like to have a more consistent and thorough employee experience
- Get tangled in GDPR, disciplinary warnings, safety training, accident logs, compensation claims
- Need different levels of access for different staff members
- Are starting to track attendance or manage performance in a more objective, data-driven way
- Have limited office space and are starting to drown in paper filing and storage
- Want easier access to more reliable employee data

### Accounting & cash flow software

Accounting software helps you record and process financial transactions including invoices, payroll, pensions, tax submissions and expenses. In general, accounting software helps you stay on top of your finances by entering, storing and analysing data for you. It can save you time on tasks like invoicing, bill payment, payroll, bank reconciliation and reporting.

Could be good if you...

- Need to be compliant with HMRC's digital tax requirements
- Want to make your invoicing and late payment chasing look more professional
- Want to save money on accountancy fees
- Need help with budgeting and spotting cashflow gaps
- Take ages to retrieve any financial information about your business
- Want to reduce the amount of tedious paperwork you have to do
- Would prefer to avoid penalties for inaccurate tax submissions

# Software selection in practice – 5 mini case studies

In this guide, we'll be exploring the subject of marketing through a collection of mini case studies.

We'll go through them alongside our very own Tom Gibson, who's spent the last few months talking to SMEs about their software highs and lows. Tom will help us pull out key themes, tips and principles as well as practical steps you can use to translate these ideas and tackle marketing challenges in your own business.



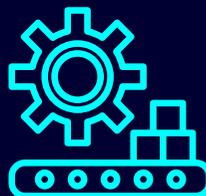
**Business services**



**Training**



**Retail**



**Manufacturing**

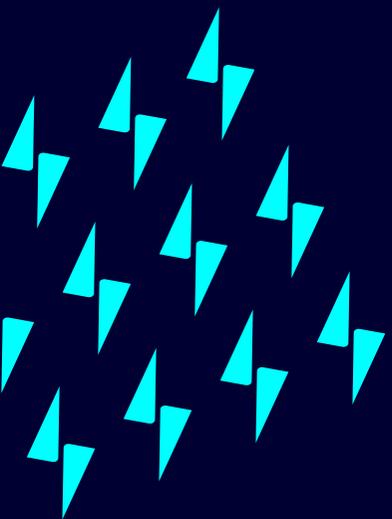


**Software**



## A note from Tom:

“We know how tough it can be running a business. No one on the outside can know what it's really like. The last thing you need is criticism. We make comments on case studies knowing that they show only a small part of a bigger picture. We have every respect and admiration for the businesses involved and thank them for sharing their story with us as a talking point.”



## Case study 1

# Scaling up by squeezing every drop out of a CRM system



### Sector

Business services

Language services firm offering translation, interpretation and localisation in over in 200 languages and dialects. Large international clients

### People

420

### Location

Leeds

### Challenge

The business was ramping up investment in marketing but finding it hard to attribute spend to sales. They were also generating hundreds of customer interactions every day. It was becoming impossible to keep on top of them with spreadsheets and manage customer relationships efficiently.

### Steps taken:

- 1 Implemented CRM system and started to make data-driven forecasts using data: "I can see which areas of the website are getting the most traffic and invest more heavily in those areas of the business"
- 2 Using IP tracking, they started to monitor the behaviour of potential customers browsing the website and create bespoke emails or mailshots to nurture sales

### Results:

-  Acquisition: IP tracking helped them identify a major retailer interested in translation services – and they now bill £400,000 a month from that single new client
-  Revenue: Clear view on cost per lead by measuring ROI of sales activity
-  Dramatic spike in revenue through improved sales performance
-  Efficiency: marketing team is seven people – "we'd need five times that number without the CRM"
-  Resource planning: By tracking data, the recruitment team could predict demand and plan the right freelance resource

### Tom says...

A great example of a clearly defined challenge, and a smart decision that a CRM system was the best tool to bring order and control to a chaotic sales process. CRM isn't just about growing sales, it's also about information on sales and the effort that goes into them. This helps your planning and efficiency.

It's also interesting how this company clearly considered areas outside the sales process where CRM software could help them. It's not immediately obvious that a better understanding of sales can enable better recruitment, but it is one of the knock-on benefits that people don't often think of.

It would be interesting to know how they managed to squeeze the pips out of their software once they'd bought it. One way is to ensure that you engage a diverse group of people in the whole implementation. The best ideas for extending the use of new software often come from those who work on the ground or on the front line every day.

# Overcoming digital inertia and resistance to change among your staff



## Sector

Professional services  
Training and consultancy firm  
providing outsourced training and HR  
support packages to employers

## People

18

## Location

Dorset

## Challenge

After 17 years' solid growth, company turnover started to limp along. The founder knew technology would be critical to the next phase of success and profitability but unfamiliar digital tools such as CRM were always greeted with resistance and confusion.

## Steps taken:

- 1 Recruited a 19 year-old into a newly created role of digital assistant to take a people-centred approach
- 2 First objective was to develop and deliver an internal training course on the CRM system to show how it could make their jobs easier

## Results:

-  Greater understanding of the benefits of technology and digital animosity has been eased
-  Rather than push technology onto people who were unfamiliar with it, staff are now using existing technology more successfully

## Tom says...

A “digital native” can certainly help unlock things, but everyone needs to come on the journey if technology is going to work. Avoid a situation where a few people at the organisation are the “tech people” and everyone else leaves it alone. The “people-centred” approach discussed in this case is something to emulate. The technology is just a tool, ultimately it is people who are going to use it, so they have to be on board.

It can be hard to get people to change the way they work. But ultimately software exists to improve the way businesses operate, so there should be a benefit for them too. It might save them time, or remove a frustrating task, or help them make better decisions. You need to sell the benefits to your people. How does it make their lives better? If you can't think of anything, then maybe you're trying to put in the wrong technology.

# Taking the leap from Excel to ERP



## Sector

Manufacturing

Baby clothing company specialising in chewable, attachable baby essentials that make parents' lives easier; including bibs, blankets and muslin cloths

## People

73

## Location

Midlothian

## Challenge

At over 100 different product lines, they were still relying on Excel to manage an increasingly complex order book, stock inventory, supply chain and product portfolio. The procurement manager spent most of her time working out what to buy and when on a long and wide spreadsheet.

## Steps taken:

- 1 MD tasked the IT department with finding a system that could be used by everyone in the business
- 2 Created a detailed requirements list. The system needed to:
  - Monitor materials, components and stock held in multiple locations
  - Handle the manufacturing supply chain from manufacturing to delivery
  - Process orders from retailers, distributors and fulfil orders directly from consumers

## Results:



Growth has accelerated: products stocked by large retailers, national contract with major pharmacy, new collaborative products with select retailers such as Joules and The White Company



Queen's Award for enterprise for international trade: 1.3m products have been shipped to 34 countries worldwide including China and USA



Newly available data enables oversight of which prints and products are the most popular in which location and which products have the best margin



Procurement manager freed up to take a more strategic role

## Tom says...

A case study which shows the impact a well-implemented ERP system can have. With systems like this, the devil is often in the detail. The requirements list is crucial here. Without that, and without a push for a system that could be used by everyone this could have gone very differently. An ERP system relates to the very core of a business, and changes can be very disorientating. Doing the right preparation, and engaging people across the whole business is crucial if you are going to succeed.

# Choosing between off-the-shelf solution or in-house development



## Sector

Retail

A online shop that sells and delivers British food to people living overseas

## People

60

## Location

Bristol

## Challenge

When the business owner bought the company in 2004 the whole organisation ran manually, printing off order sheets from the website, compiling a spreadsheet, going to Tesco to buy everything, storing it in a garage, then packing it in boxes and sending it off. Manual processes were stifling growth.

## Steps taken:

- 1 Phase I:
  - Rented a warehouse
  - Hired picking and packing staff
  - Revamped the website
  - Built in-house warehouse management system
- 2 Phase II (2 years later):
  - Segmented the company's tech into DIY and outsourced systems to improve without growing the technology team
  - The internal team focused on the website, customer experience and customer-facing systems
  - Chose an off-the-shelf warehouse management system

## Results:

-  Turnover now up to £15m
-  Using an off-the-shelf solution saved them two years' development work
-  Allowed them to focus on the front-end website and the customer experience
-  More efficient processes, more in control of stock, possible to scale
-  Now learning from the data and starting to automate aspects of the business

## Tom says...

A big challenge for lots of firms: whether to do it yourself or buy something off the shelf. As you can see from this case study, sometimes a mixed model is best, and your position might change over time.

Off-the-shelf products have a lot to recommend them. They are already built, so you avoid all the risks and costs that can come with development. Many of them are built and maintained by large firms with deep pockets who can add features and upgrades you couldn't afford on your own. And it can give you greater flexibility – it can be easier to hire staff with experience in an established system. Switching costs can be lower if you want to change suppliers or if your needs change.

But, no one knows your business as well as you do, and an off-the-shelf product will never be as tailored as something you build yourself. Sometimes it's crucial to have something which meets every one of your requirements perfectly, it might even be your source of competitive advantage. It's just crucial to make all these choices with your eyes open, and really weigh up the options before making a decision.

## Case study 5

# Technology to make remote working a success



### Sector

Software  
Social media management software allowing users to schedule posts, analyse competitors' activity, and find content to share

### People

15

### Location

Global

### Challenge

Scaling up from a one-man-band, it was hard to find the right people with an in-demand skillset. Building a team and getting the culture right was vital for retention and communication.

### Steps taken:

- 1 Used a range of tech solutions designed to enable remote working, foster collaboration and communication across the team
- 2 Used AngelList (a tech startup hiring website) to hire contractors in various locations and build a remote team across the globe
- 3 Used Calendly and Google Hangouts to arrange interviews, Asana for onboarding new team members and Nuclino knowledge base
- 4 Used Asana and Slack to keep projects on track and avoid any communication issues with the potential lag in response times.
- 5 Used Loom, Figma and Google Drive to share high-bandwidth files quickly
- 6 Used a Slack plugin called Donut to randomly pair two people in the company each week to have a social chat with someone they wouldn't normally work with.
- 7 Used Google Hangout for work discussions and one-to-ones with team lead once a week.

### Results:

-  Office costs remain low as the team grows
-  Widened the pool of potential applicants
-  Hiring without commute limitations
-  With customer service team members in different time zones allows them to respond promptly to clients in any time zone
-  Staff retention is high as perks include working location and hours of choice

### Tom says...

An interesting example of a company whose whole strategy is built around technology. This approach involves many different kinds of software, with lots of different specialist tools working together to enable a particular way of working. Leaders in organisations such as this need to be constantly on the look-out for new tools which can help optimise and refine processes. This means being up to date on the latest software, but also having a really intimate understanding of how your company works, and how your staff go about their roles. Knowing about all the best new tools doesn't help you if you aren't able to see how they could fit into your firm in a way that increases productivity.

# How do I choose software?

“  
The biggest brands are spending lots of money on advertising and search optimisation

**Successful software shopping starts with research. It's worth investing time in this phase to arm yourself against the hard sales pitches you'll get from vendors.**

One of the hardest parts of buying software is getting past the marketing blurb and getting down to brass tacks: what can it really do?

Not all sources of information are objective and unbiased. It's a crowded marketplace and all the vendors are making lots of noise about their innovative, unique, turnkey solutions. The biggest brands are spending lots of money on advertising and search optimisation to make sure they pop up whenever you google anything related to their product.

So brace yourself, dive in and take with you these top 10 research do's and don'ts from our SMEs...



**Don't just go for the brand name you know**

Because small and mid-sized businesses come in every shape and size and have drastically different needs. A system which works really well for one company would be inappropriate for another.

**Don't be afraid of asking all the questions**

Your research will throw up a few things you'll need vendors to clarify. The best salespeople will be able to explain things clearly. And if they can't, would you buy from them?

**Don't choose the one your friends went with**

Lots of firms have told us that they bought something based on a brand name which turned out not to be right for them. Unfortunately, there's no failsafe way to shortcut research.

**Don't forget to leave yourself room to move**

Your business is constantly changing and the software market is constantly changing. Blink and there's something new to think about. A lot of products are sold on a subscription model, to allow for updates.

**Don't do it alone**

Who else in your business will be relying most on this software? Talk to them and find out about current processes, bottlenecks and pain points to will help you narrow down the field.



The truth is, no one can really tell you which product will be best for your business. You have to do the research, trust your instincts and make an informed choice.



**Do double-check the facts**

Be suspicious until you've verified information. We have spoken to a number of SMEs who found that products did not actually have the features that were listed on product websites.



**Do read online publications with reviews**

Check whether the information is coming from a truly independent source or whether it is sponsored advertorial content written on behalf of a provider.



**Do use a range of sources for your research**

The more the better. Look at supplier websites and third party sources, trade magazines, IT publications, professional bodies.



**Do get your hands on a demo**

A good place to see software in action is to go along to expos and exhibitions. Vendors will give you the hard sell but at least you'll get a feel for what their product is like to use.

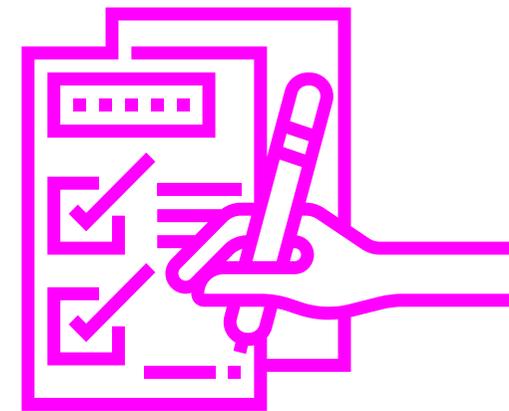


**Do ask other businesses about what they use**

Ask trusted peers, partners and colleagues about their experience of the kind of software you're interested in. Ask what worked well and what didn't. Networking events are good for this too.

**A word about software comparison sites**

Some comparison sites appear to be independent but aren't. They are profit-making enterprises and this inevitably influences the information they provide. Companies may pay in order for their products to appear higher in listings, the site may receive commission from providers for when users clicks on the links on the site, and content may have been written by or on behalf of providers. Even user reviews have sometimes been submitted in return for incentives. By all means use comparison sites but keep your cynical head on. We like the ones that include simple technology explainers and allow you compare products by a range of criteria such as cost, support, features and compatibility.



# Your software shopping list

The next step in your software search is to create a list of the features you want your software to have – and then shortlist products that best fit.

Here is a series of questions that can help you identify the right software. The SME owners we spoke to say it's worth going through these before you start looking at particular products. Gather your thoughts on each section before you speak to any salespeople. Knowing what you need will help you filter more effectively – and get to a good shortlist more quickly.

You'll see that these questions are not all about technology. They're designed to help you understand your business better, so you know exactly how your software will fit in. There's a lot here but work through it at your own pace.

## Features and functionality

- What would you need the solution to do?
- Do you operate in multiple locations and need software support this (e.g. working across multiple languages, currencies, tax regimes or regulatory environments)?

## Specialisation

- Do you want an off-the-shelf, customised or bespoke solution (along with the implementation costs associated with each)?
- Does your industry or any other factor mean that a standard solution might not work for you?
- Is there anything non-standard about how the software will be used e.g. in specific circumstances, conditions or locations?
- Do you have the capability to develop an in-house solution?

## Compliance & security

- What security needs do you have?
- Do you work with clients who have any particular requirements?
- Are there industry or sector-specific regulations you need to remain compliant with?

## Integration

- What other systems will this solution need to integrate with?
- Do you have an existing system that the new one is replacing?
- Do you need to transfer data from an old system to the new system? How will this work?
- Are there any plans to add further systems that you might need to consider?



### Infrastructure

- What infrastructure do you already have in place?
- Does the system you're considering create any new requirements or equipment (e.g. connectivity, smartphones, operating systems etc.)?

### People & stakeholders

- How will the solution impact people in their day-to-day roles?
- What help will they need to transition to new ways of working?
- Will any users have specific requirements that you'll need to consider?
- Do your external stakeholders have any particular needs you should take into account?

### Support & implementation

- What help will you need to set up and implement the system?
- What training will your people need?
- Do you have the capability and capacity to support the system internally?
- What level of ongoing support will you require and what are the associated costs for this?

### Future needs

- What are your future growth ambitions and how will the solution you're considering accommodate this (e.g. more licences, volume of transactions etc.)?

### Type of partner

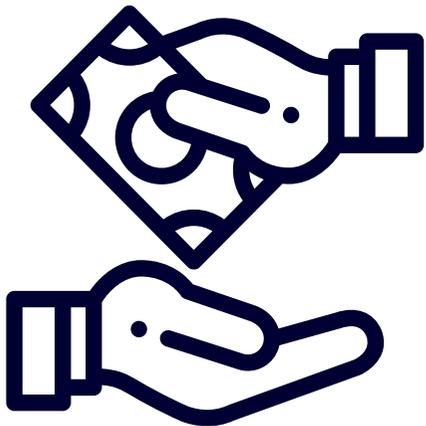
- Would you prefer a large provider where you are a relatively small customer, or a smaller provider where you may be a large customer?

### Budget

- What's your budget?
- Do you have a buffer in the above figure for unforeseen expenses?

# Summary: buying with confidence

Armed with your requirements and research, it's time to contact vendors. It's important that you choose a company you can trust. Let's give the last word to the small business owners we spoke to as we created this guide. Here are their top purchase-stage tips.



*Be realistic. No software is going to solve 100% of your problems. Just focus on one or two things you want it to achieve and decide if you can live with the trade-offs.*

*If it's really hard to get proper warts-and-all answers from a supplier, be very wary of buying from them. An open buying relationship sets the tone for a more trusting ongoing relationship.*

*Go hard on the vendors. Meet with them, ask all your questions, get them to show you demos, talk to their other customers too – or ask to see testimonials.*

*Get past the sales pitch and drill down into exactly what support you'll get for your money. When you're doing payroll at midnight can you call them up?*

**Good luck!**

# Follow us

**Be the Business is a small, not-for-profit organisation dedicated to boosting productivity among UK businesses.**

We're doing it by helping leaders of small to mid-sized firms do what you do best: improve, innovate & inspire.

Businesses like yours don't have deep pockets or layers of management to throw at productivity. And quite frankly you're doing a superb job all on your own. Be the Business is just here to support you with relevant programmes and useful content that might help you nudge productivity in the right direction.

We believe that inside every business there's at least one Change Maker who's looking for tips and tools they can use. You might be the owner, you might be leading a marketing, HR or ops team – or you might be doing it all at the same time. Either way, you're pretty amazing at many things, but you could be facing challenges in areas like scaling up, efficiency, tech, staff retention, customer service, innovation or strategic planning.

Our content aims to support you on all these topics, helping you develop your ability to run your business, lead your team, make decisions, and get the best out of the resources you have.

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