



5 Tips for Viewing Software Demonstrations

You're in the market for business software. You've already taken the time to figure out what you need, researched the types of solutions that are out there and narrowed them down to a short list of the 3-8 vendors you are interested in. Now comes the hard part.

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Many organizations fail to get the most out of a live software demonstration. Without an idea of the process they should follow, companies can miss out on important information about the product.

Deciding on a final software solution and determining which vendor will be the best to work with involves more than just looking at their website and emailing customer service. Live software demonstrations are one of the key components to evaluating whether the software fulfills the requirements you have and if the vendor will be accommodating to your needs.

Unfortunately, many organizations fail to get the most out of a live software demonstration. Without an idea of the process they should follow, companies can miss out on important information about the product and its viability for their business. To avoid this, there are five simple tips to follow.

1. IDENTIFY YOUR NEEDS:

At this point in the software selection process your needs should already be identified and articulated. Take the time to review and clarify them. What do you need the new software to do? What business goals do you have and how will a new software system help you reach them? What specific software features are the most important “must haves” and which are simply “nice to haves?”

2. WRITE DOWN A PROCESS SCRIPT

Without guidance from the buyer, software vendors will often talk about the features of the product that they like the most. Unfortunately, they might not be the features most relevant to your needs. To avoid this, it's important to have a written script for the

processes you'd like the software vendor to cover in their presentation. These processes should include the business functions and tasks—the “must haves”—that are most important for your organization to have in a software platform.

3. CREATE DETAILED SCORECARDS

It's good to view more than one software demonstration during the selection process. Unfortunately, after the first two or three it might become hard to remember specific details of each presentation and thus effectively compare the different software packages. Creating a standard scorecard for rating software packages will not only help you record your impression of the software when it's freshest in your mind but will also allow you to objectively compare ratings among the different software solutions you have viewed. Scorecards can also be used to make sure vendors stick to your process script (see step 2) by letting them know you will give lower ratings to those who do not.

4. DEBRIEF AFTER THE DEMO

After the demonstration is over and the vendor has left, take 20 minutes to an hour for team members to talk about the software solution. This allows the team to crystallize their impressions and hash out any issues or details they noticed or thought of during the presentation. Some of this time can also be used to complete the scorecards and record last minute notes.

5. DON'T DO MORE THAN FIVE DEMOS

Setting aside the fact that viewing too many demos will inevitably cause them to blend together; there are other reasons to limit the number of software presentations you see. Software demonstrations are time consuming, some lasting over the course of several days, and they demand a lot in opportunity costs for employees who could be focusing energy elsewhere. Also, the software demonstration phase is not the occasion to look at dozens of vendors and software platforms. Because it's a time consuming, later stage in the software buying process, the demo is best used as a method for really getting to know, in depth, the three to five vendors and solutions which already appear to best meet your company's needs.

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