

# What to prepare before asking for business software

A checklist to print or keep open during the first meeting. These are the things I look at in the first analysis: with them to hand, the quote starts from how you really work.

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Handwritten notes are fine. If an item doesn't apply to you, skip it.

## Who will use it

- ☐ How many people, in which departments, and how many at the same time
- ☐ Where they work from: office, warehouse, building site, phone
- ☐ Who can see or change what (for example, only accounts can touch prices)
- ☐ Who on your side follows the project and can make decisions

## What you use today

- ☐ The spreadsheets, with the notes and colours that mean something
- ☐ The programs in use and what you do in each
- ☐ The paper forms and the documents you print: quotes, delivery notes, labels, job sheets
- ☐ The information that lives only in emails, on WhatsApp or in someone's head

## One real job, from start to finish

- ☐ A recent case told step by step, from the customer's request to the invoice
- ☐ Who does each step and where they write the data
- ☐ The points where someone copies things by hand
- ☐ The exceptions: the customer with their own price list, the order split in two, the return

## The data to bring

- ☐ Roughly how much: customers, products, documents a year
- ☐ How many years of history the new software really needs
- ☐ Which file wins when two figures don't match

## What it has to talk to

- ☐ Invoicing and your accountant
- ☐ Online shop and marketplaces
- ☐ Bank and couriers
- ☐ Label printers, barcode readers and other devices

## Where to start

- ☐ The part that wastes the most time
- ☐ What has to work from day one and what can wait
- ☐ A date to meet, if there is one: the end of the year, the old program's contract running out
- ☐ A rough budget, if you have one: it helps decide how much goes into the first milestone

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Send me what you have, even if it's incomplete: I answer myself, in person.

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