The Non-Techie's Guide to Finding and Choosing Software Online

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Overview

When it comes to finding and choosing software online, there's a whole lot of how-to materials online. So many in fact, that your search for the best software solution is often in danger of morphing into a search for the best process!

To help you cut through all that noise, I've detailed the six steps I use when finding and choosing online software. These steps are designed to be as painless as possible without sacrificing your need to find the best software online to fulfill your business requirements.

Step 1: Conduct a Software Needs Assessment

Goal: Create a checklist of what you need the software to do.

Deciding what you need the software to do is the cornerstone of my process for finding and choosing online solutions. If you do not do this step first then the end result, the best software online to fulfill your business requirements, is at risk.

To compound this problem, online software comes in all shapes and sizes. Take online time tracking solutions for example:

Solution 1 offers just time tracking, plain and simple. You can track your time only.

Solution 2 offers just time tracking, plain and simple however, you can track everyone's time (your employees, contractors and clients) in addition to your own.

Solution 3 offers time tracking for everyone and invoicing. You can track time and then send an e-mail invoice to your clients.

Solution 4 offers time tracking for everyone, invoicing and payment. You can track time, send an e-mail invoice to your clients which they can pay online at the site.

Solution 5 offers time tracking for everyone, invoicing, payment and the ability to download data formatted for the most popular business accounting programs. You can track time, send an e-mail invoice to your clients which they can pay online at the site and then you can download the transactions and update your accounting system.

Solution 6 offers time tracking for everyone, invoicing, payment and an API. You can track time, send an e-mail invoice to your clients which they can pay online at the site and then the transactions are automatically downloaded and added to your accounting system.

Solution 7 offers time tracking for everyone, invoicing, payment and a full-featured accounting system. You can now have an all-in-one accounting system that tracks time, sends an e-mail invoice to your clients which they can pay online at the site and all of this is managed and kept up-to-date in the same spot.

The key action here is to sit down with pad and pencil (or whiteboard and markers) and try to capture every feature which you would like the software to do. Go nuts, you can always scale it back later, but this is the time to try and find the best solution so shoot for the moon.

It does help however, if you can keep "shoot-for-the-moon" features separated from "must-have" features. You'll see why in Step 2.

During this process, keep in mind what you may already have in place. For example, if you already have an accounting system that works fine and which you would not like to replace, do not add, "Full-featured accounting system" to your list of software criteria.

Also, keep your budget in mind. Most online software providers offer a limited free option and then a few tiers of membership, each increasing in both cost and features. Charges are typically monthly, however many of them allow you to pre-pay for longer periods at a discounted amount. So, figure out what you can (or want to) pay monthly for this particular solution and add it to the list of features.

One more important note on budget: when you look at each solution, make sure that it scales affordably. In other words, if you start using it and then it gets too expensive to use it down the line because you are growing and need more storage, transactions or users, that solution is not likely the one for you.

This may sound like a bit of work, but the the big plus is that once you have your online software needs written down, you have a powerful checklist against which you can evaluate each solution you will consider throughout the next steps. If the solution does not meet one or more of the criteria, off it goes!

Step 2: Identify Possible Online Software Solutions

Goal: Create a short-list of potential online software solutions

Armed with your online software criteria checklist, it's time to hit the Web and find solutions that may fit your business needs.

For me, this is the step I enjoy the most! I love seeing how people and companies have figured out how to get things done online and this is where you get to explore.

The best part of this step is that a lot of this work has already been done for you. There are many solid resources where lists of online software have been gathered and are kept reasonably up to date (results will vary from site to site). Below, I have listed my top resources for quickly finding online software solutions. A couple of tips for using these sites:

1. Make full use of the search and pre-set category tags that most of these sites offer as it will help you hone in on your targeted solution types

2. Depending on how targeted your business needs are (e.g. Simple time tracking vs. a fully-functional accounting system) you may wish to start at a detailed level or at a high level.

However, it often helps to use both detailed and high-level sorting as these are human-created directories and sometimes things are put in weird places (that's how I often find my best solutions!).

So, if a feature should be included in your solution (e.g. billing and payment as part of an accounting system) make sure you take a quick look in each of those subcategories as well.

Top Resources for Finding Online Software Solutions Quickly

1. **DreamSimplicity** - http://www.dreamsimplicity.com/search.html

2. **MakeUseOf** - http://www.makeuseof.com/dir/

3. **Feedmyapp** - http://www.feedmyapp.com/p/web_20_tags

4. **Go2Web20** - http://www.go2web20.net/

5. **Web Based Software** - http://www.web-based-software.com/

6. **Mashable** - http://mashable.com/ (note: with Mashable, use the search box in the top right to find types of software (e.g. time tracking)

7. **Listio** - http://www.listio.com/web20/search.php (note: the search works a bit better than the tags)

8. **Emily Chang – eHub** - http://emilychang.com/ehub/ (note: another site on which the search works best – the search box is halfway down the right column)

Another place to look is, of course, Google (http://www.google.com). Try searching for "accounting software online" or "online accounting software" or "time-tracking online" and "time tracking online".

As I just demonstrated, use many variations. Play with using quotes or not; try putting quotes around "accounting software" but not online ("accounting software" online). Each of these can pull up different results and are worth a try.

Also, similarly to tip 2 on the previous page, use search terms that are not focused on the main feature (e.g. use "billing and invoicing" as well as "accounting" if those features are part of your criteria list).

Lastly, pay attention to the sponsored ads at the top and side of your search results. I have found my best targeted results by clicking on those ads. Yes, they are trying to sell something, but hey, you're trying to buy something so it all works out!

The key action here is to create a short-list of the online software solutions which fit all of your required criteria and (hopefully, but not required) some or all of your "shoot-for-the-moon" criteria. To do this:

1. When you come across an option in the resources listed above, click on the link to view the solution's site.

2. Once you are there, look for the features that this solution offers. These are usually listed under, "Features", "Tour" or "Pricing" (this last is good since it typically gives you an option to view all of the features laid out side-by-side in a comparison matrix – that's gold and very useful!).

3. Compare your online software criteria checklist created in Step 1 (including cost) with the features that the solution offers. If all of your required criteria and (hopefully, but not required) some or all of your "shoot-for-the-moon" criteria are met, this solution should be added to your short list!

There are two considerations to keep in mind as you go through step 2:

1. If you feel that you have enough acceptable solutions on your short-list, feel free to stop at anytime. Heck, if the first one you find looks awesome, go for it! The key here is to be as thorough as you feel you need to be in finding a solution that meets your needs.

2. If you cannot find anything that matches all (or even most) of your required criteria, you might need to dial back some of those requirements. Some options:

   1. You may be able to use two or more online software solutions together to get the results you want. This integration is possible because of the <u>APIs</u> the vendors have built to work together. In fact, because of <u>APIs</u>, many online software products allow third-party developers to create software that fills-in or enhances their own. If you cannot find a good solution, take a look at the top option's sites and see if they have addressed this for you.

   2. Online software is still a fairly young industry and, though I believe there is a solution out there for everyone, if you cannot find what you need online, you may need to look offline for now.

Step 3: Read the Reviews

Goal: Based on reviews, remove solutions from your short-list

This step focuses on finding and reading reviews of each solution on your short list.

The key action here is to learn about other people's experiences with each solution, identify issues and, if the issues you discover about a particular solution are beyond your comfort threshold, remove that solution from the short-list.

Some things to look for:

1. Bad customer service and help systems
2. Broken functionality
3. Confusing functionality - poor usability
4. Frequent downtimes
5. Customer data loss or theft
6. Vendor company issues such as financing or leadership

The best source for reviews is our old friend Google. Head over to http://www.google.com and enter: "<solution name>" review (e.g. "Jimdo" review). You want the solution name in quotes to assure you will find reviews for that particular product.

Read through the search results; make sure you go a few pages in to assure you get most of the pertinent ones. You can also use the handy new "Search Tools" on the left of the Google search results screen to order the reviews chronologically so you can see the latest material.

If Google does not work out for you, try some other search engines such as Yahoo (http://www.yahoo.com), Bing (http://www.bing.com) or Ask (http://www.ask.com).

Step 4: Do Some "Social Shopping"

Goal: Based on trusted recommendations, remove solutions from your short-list

This is an optional step yet a very valuable one if you choose to use it during the process of finding and choosing online software.

Social Shopping is the act of making a purchase decision using input from your network of family, friends, acquaintances and business connections.

The key action here is to get feedback on each remaining solution on your short-list and, if the feedback for a particular solution is poor, remove that solution from your short-list.

Asking family and friends is pretty straightforward; just pick up the phone, send them an e-mail or (gasp!) visit in person and talk.

What really kicks this process into high-gear is when you start using your social networks. Some suggestions:

1. Post the options on your Facebook wall and ask for opinions
2. Tweet the options to your followers or a #hashtag list on Twitter and ask for opinions
3. Ask about the options on LinkedIn in their "Answers" area or in an appropriate group
4. Ask on Yahoo! Answers (http://answers.yahoo.com/)
5. Create a poll widget at Widgetbox (http://www.widgetbox.com) and post it on your site, your blog, on Facebook and any number of additional spots to get feedback.

As you can see, there are many possibilities for implementing this step. I urge you to try one or two (or more!) to really tap into the knowledge and experiences of your trusted networks.

Step 5: Take a Test Drive

Goal: Use each of the remaining solutions on your short-list and remove any that do not work for you

Nothing helps you shake out a solution better than signing-up and trying it out. This is where the rubber meets the road; where you will say, "Hey this is cool and intuitive" or "This is hard to learn, but powerful" or "This solution stinks!".

The key action here is to use each vendor's free membership level or trial-period to get a feel of how each remaining solution really works for both you and your business and, if a particular solution does not work, to remove it from the short-list.

I do this step towards the end because hopefully you have narrowed down your short-list to 2 or 3 potential solutions which makes for a do-able test drive step.

If you have more than 3 left, try to knock some solutions off the short-list. It is possible to test drive more than 3, but the effort grows with each solution.

Preparing for a Test Drive

Before signing-up for your first test drive, create some "use-cases" or processes which you would like the software to perform. This will assure that you are testing with your "real-world" scenarios and that the software is indeed doing what you want and need it to do.

For example, set up a fake customer and project, enter some times into the time tracker for that project and then bill the fake customer. Make sure you use your e-mail address (or some throw-away ones from Hotmail or Google) so you can see what the customer will see as well as what you will manage on your end.

If you want to involve additional people (such as employees who will be performing this process once a solution is selected) go ahead and form a test drive team with each step in each use case mapped to a person or role. This is a great way to get buy-in for the solution you end up picking from the folks who will be using it once the process for finding and choosing your online software is complete.

Taking a Test Drive

You should run each test drive one-at-time by which I mean sign-up for each solution only when you are ready to start the test drive for that solution (I've run out of time before on many a solution's trial period when I signed-up for all the solutions at one time and then worked my way through one-by-one).

As you test, keep in mind that all test drives should take into account usability: how easy and intuitive is it to get done what you, and everyone else in the system, needs to get done? That said, sometimes usability can be sacrificed for functionality; it's a balancing game and a judgement only you and your organization can make.

For each solution left on your short-list:

1. Sign-up for the free or trial period

    1. If the vendor does not offer one, contact them and ask for one.

2. Perform any setup that is required

    1. Is it easy to get set-up and running?

    2. If you needed help, was it easy to find?

    3. If you needed to contact support because you could not find a solution in the help area, did they respond promptly, cheerfully and most importantly, did they resolve your issues?

3. Run your use cases through the system and see how they perform

    1. Were you able to run your use-cases all the way through?

    2. Even if you experienced some issues, if you can get the use case to work within a reasonable time, that is a success.

    3. If you had any issues, were they resolved by changing settings or a work-around within the solution?

4. If you must cancel your trial or account before you are charged at the trial-period's end, cancel it at the end of the test drive

Wrapping Up the Test Drives

Once all your test drives are complete, sit down (if you had a team, involve them, too) and compare results.

If you have a stand-out winner, great! Otherwise, think or talk it through and try to come to a consensus on the best solution.

Step 6: Trust Your Gut

Goal: Trust the process and yourself

If you followed this process for finding and choosing online software all the way through, you should have arrived at a single solution that will work to fulfill your business needs.

However, if you have two solutions that are neck-and-neck or even one solution that you just don't feel great about, it's time to trust your gut.

At the end of the day, you and your company will be living with the selected solution for a long while. Make sure you pick one that not only meets business needs but also fits your culture and feels right.

Good luck with your search!

About the Author

Matt Mansfield blogs at www.mattaboutbusiness.com. His mission is to help folks make the most of technology without them having to know anything besides the basics of how to make it work successfully.

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