

## THE 5 QUESTIONS YOU MUST ASK BEFORE BUYING PROPOSAL SOFTWARE FROM ANYONE

### SUMMARY

This guide provides you with the 5 questions to ask every proposal software provider before making a purchasing decision. This guide will help you choose the right software for your needs and help you disqualify the software that is not right for you.

### 01. FEATURES (*Does the software do what you need it to do?*)

You want a tool that will meet your immediate needs while allowing for growth without surprises... that the size of your team, proposal volume or proposal database won't outstrip the software's capabilities... or that you haven't purchased a module that was in the demonstration. In addition, you need to be able to control the software yourself. If behind the scene, IT or Vendor involvement is required to meet the 'demo' state, you'll find yourself both frustrated and unable to access all of the features necessary to be successful.

- Does the software's interface appear intuitive using familiar tools, or complex requiring significant training?
- Is there an integral navigation guide and are there integrated self-help tools such as on-line videos at your fingertips?
- Is the software built around a workflow that will improve your current process?
- Does the software require significant customization for you to use effectively?
- Is it a comprehensive solution or are there modules you must buy separately and coordinate meaning:
  - Can you segment your proposal content to whatever level of granularity is required to reflect your organizations products and services?
  - Can you search within both a database records full content and assignable segmentation 'Attributes'?
  - Can documents in your database be related to each other?
  - Can you track all proposal activities?
  - Can you report on all proposal activities?
  - Can you maintain the accuracy and compliance status of your database?
  - Can you assemble your major account proposals, marketing documents and Pitch Books?
  - Can you create and maintain sales proposal templates without programming skills or support?
- Can you search on the contents of Word, PowerPoint, Excel, PDF and HTML files?
- Can you search 'anywhere' within your organization's networks, or are you restricted to the application's database?
- Once found can you insert the content directly into your proposal document or are you forced to cut and paste from the proposal tool to the clipboard and then to your local desktop?
- If you're working as part of a proposal team are there tools for coordination to avoid duplication of effort?
- Do your Subject Matter Experts require licenses to utilize the application?
- Are there tools for automated and scheduled database content verification?
- Can you create specific roles that define access to *both* data and functionality?
- Is there mobile access via any or all Smartphone and Tablet devices?
- Is there integrated 'Case' Management within the software for support issues?
- Is there 24/7/365 access to support?
- Is there a User Group?
- Does the vendor offer customized or generic training?
- Is there an on-site training option available?
- Is the Customer Support Team comprised of experienced proposal professionals?
- Is the Customer Support team on or offshore?

## 02. BENEFITS (*Does the software save you both time and money?*)

The only reason to purchase proposal software is to improve your current situation. Proposal volumes and the complexity of the requests for information are rising across the board in every market and every industry. Your options in meeting this situation most often preclude increasing headcount. So, if you're not 100% sure you'll become significantly more productive post deployment, making the change will not be worth the effort.

- Do you believe the software will make you more productive?
- Is there a demonstrable pay pack on 'hard dollar' costs such as direct FTE costs?
- Is there demonstrable time-savings produced when interfacing with non-proposal team colleagues such as Subject Matter Experts (SMEs), Content/Compliance Officers, and Business Development or Sales Team Associates?
- Does the installation or access to the software require little, or a great deal of IT resources to install? To maintain? Are these requirements clearly defined?
- Can you deploy and reach *full production* with the software in 30 days?

## 03. PRICE (*What is the true cost of ownership?*)

Are you being 'low balled' or are all the costs of ownership now and into the future transparent to you? If expensive consulting becomes the answer as you fail to find the time to set the application up or populate your database, whatever the license fee may be, will pale by comparison. Be sure to look for both a fixed price and a 'turn key' quote.

- Are you provided with options for both On-Premises installed, and hosting (SaaS) subscriptions?
- Is everything you need to successfully deploy the software included (e.g. data conversion, set-up, installation and training)?
- Are you provided with Support & Maintenance options that best meet your budget and your specific needs?

## 04. DUE DILIGENCE (*Are others using the software and happy with it?*)

In today's day of software disappointments, you'll want to insure you've spoken to users of your first choice software who profile your situation. And you'll want to understand the entire relationship from initial deployment through ongoing support resolution. If the vendor insists on being on the call you're not talking to the right reference.

- Are you able to speak directly with current users from organizations just like yours in terms of industry, size of team and proposal and database volume?

## 05. GUARANTEES (*Are there a guarantees that the software will do what you need it to?*)

All software vendors make the demo look like a walk in the park. But are they prepared to stand behind the promise of getting you to the same state? Be sure you understand your responsibilities in the process and that you have the resources and management's support to hold up your end of the bargain. No one can deliver proposal software to you without your involvement. If the process looks too easy it's probably not the true picture of what's involved.

- Can the vendor provide written assurances that the implementation will work as advertised?

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