6 TIPS FOR CHOOSING THE RIGHT TECH
AND AVOIDING REGRETS

There's a lot of software out there and it can be overwhelming to choose one. These 6 steps will help you prioritize your needs, see through the sales marketing and make the best decision for you. Here's the kicker: the perfect app doesn't exist and the best solution may be a combo of software but following these 6 steps will help you get clear on the tradeoffs and make workaround plans so you can check off all of the items on. your wishlist.

1 GET CLEAR ON YOUR NEEDS

List out all of the features you'll require of this tech. Be specific. Does it need to be bilingual? Do you need integrations with specific tools? Will you have multiple users that need specific access or restrictions?

2 IDENTIFY YOUR NON-NEGOTIABLES

These are the make-or-break features, your must-haves, your non-negotiables. Having these identified will help weed out potential apps quickly so you can narrow down your choices sooner.

3 TRACK YOUR RESEARCH

Use a doc or spreadsheet to rate and compare your top 3-5 contenders against your needs. Use this sheet to track add-ons, workarounds, bonus and missing features. It'll also come in handy if you need buy-in from your team or to justify your decision.

4 GET A LIVE DEMO

This is when your list of needs and non-negotiables will help you skip the sales pitch and get down to the details you need to make a good decision. A live demo is the best way to get your specific questions answered.

5 SIGN UP FOR FREE TRIALS

30 days is ideal but a minimum of 2 weeks will help you get to know your new tool and test out your configuration plans. You can also use this time to see how this tool can integrate with your other tools.

6 CHECK OUT THEIR DOCUMENTATION

Most apps have how-to documentation, but the quality of it is what matters. How easy is it to follow? Do they have videos and webinars? The best software companies do their best to make sure their customers get the most out of their app. Bad and out of date documentation is a red flag.