

SCORECARD

The Four-Stage Process Behind a Software Purchase That Pays Off

The right software can change how a business runs, bringing faster decisions, cleaner data, and more output. Companies that get the most value from their software purchase plan for four stages before they buy, covering strategy, selection, implementation, and adoption.

LAUREL ADVISORS

60% of small and midsize businesses made a software purchase in the past 18 months that they came to regret

-Capterra's Tech Trend Report

Vendor selection is really four decisions in one: strategy, selection, implementation, and adoption.
The companies that give all four equal weight are the ones that turn a purchase into an advantage.

01

Strategy

02

Selection

03

Implementation

04

Adoption

Strategy Questions

	Score (1–5)
Can we state the specific gap this solves in one sentence, without naming a tool category?	
Have we confirmed this is a data or process problem, not a people or accountability problem?	
Do we know what "solved" looks like, in a measurable way, six months from now?	

Scale instructions: 1 means no or not sure, 3 means partly in place, and 5 means yes with proof. Use 2 and 4 for in-between answers, and don't round up. The people running the rollout should score independently and then compare.

Selection Questions

	Score (1–5)
Does this tool fit how our team actually works today, not how we wish it worked?	
Does it integrate cleanly with the systems it has to talk to?	
Have we priced the full cost (implementation, integration, training, admin) not just the license?	

Scale instructions: 1 means no or not sure, 3 means partly in place, and 5 means yes with proof. Use 2 and 4 for in-between answers, and don't round up. The people running the rollout should score independently and then compare.

Implementation Questions

	Score (1–5)
Do we have a named owner for rollout, separate from the vendor's project manager?	
Have we mapped how data and workflows change, not just where the login screen goes?	
Is there a plan for what happens to the old tool or process during the transition?	

Scale instructions: 1 means no or not sure, 3 means partly in place, and 5 means yes with proof. Use 2 and 4 for in-between answers, and don't round up. The people running the rollout should score independently and then compare.

Adoption Questions

	Score (1–5)
Is there a training plan that goes beyond a single kickoff session?	
Have we removed the old workaround, so the new tool is actually the easiest path?	
Is someone accountable for checking usage at 30, 60, and 90 days post-launch?	

Scale instructions: 1 means no or not sure, 3 means partly in place, and 5 means yes with proof. Use 2 and 4 for in-between answers, and don't round up. The people running the rollout should score independently and then compare.

Scoring

Add all twelve answers for a total between 12 and 60 and add each stage's three questions for a subtotal between 3 and 15.

TOTALS

54-60	Ready to Sign
42-53	Sound with Gaps
30-41	Pause and Fix the Weakest Stage
12-29	Go back to the Problem Statement

STAGE RULE

Any stage under 9 is a weak link even if the total looks fine.

QUESTION RULE

Any single question scored 1 or 2 gets resolved before signing.

If you're mid-selection right now, or living with a tool that never fully took hold, let's talk through where the process needs the most support.

CONTACT

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