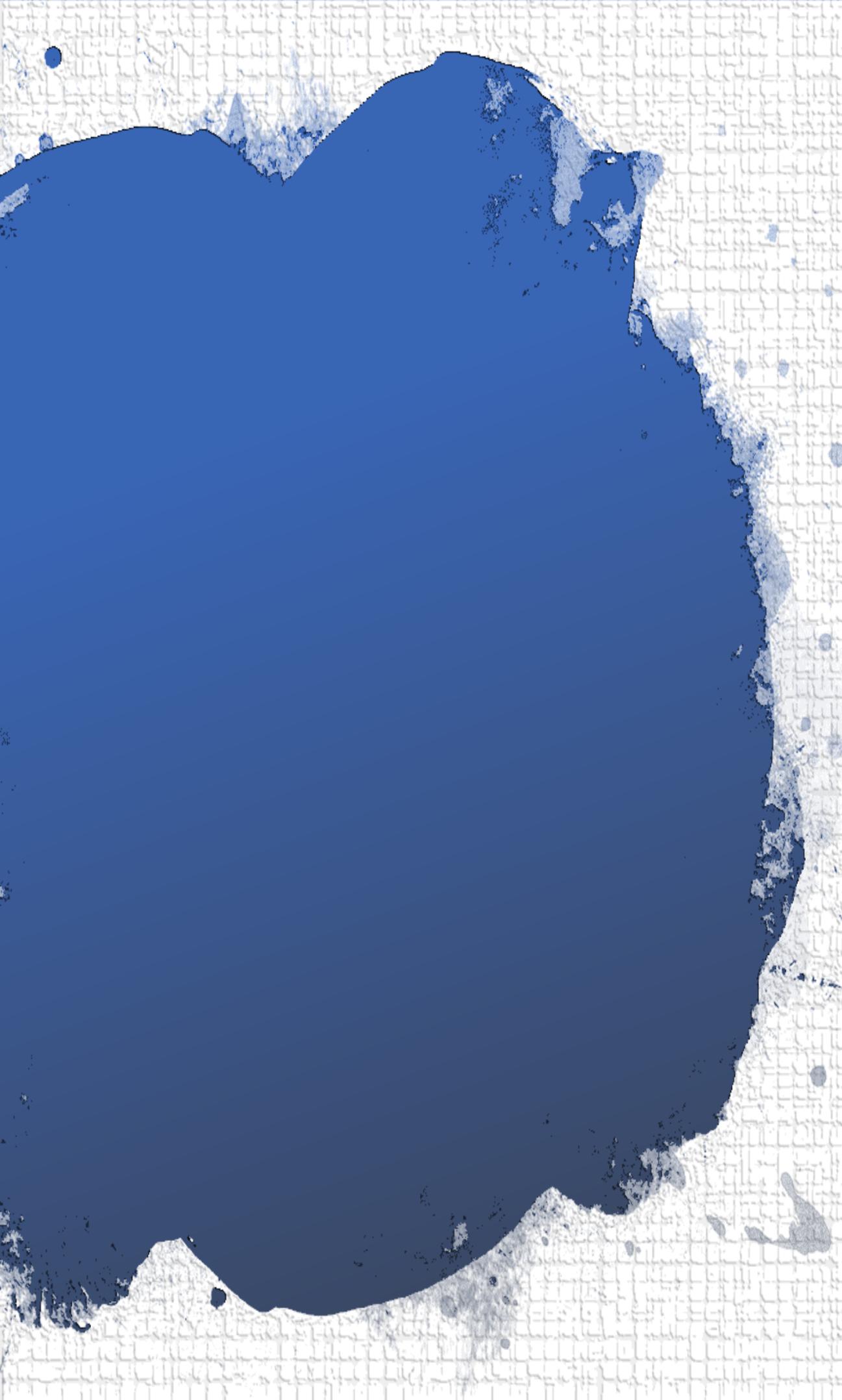


Phil Hearn's

Product Evaluation Guide

Brought to you by MRDC Software

Evaluating any market research software package whether it is for CAPI, CATI, CAWI, crosstabs, reporting or any other task is not easy. When deciding what is best for your business, you will need to take into consideration functionality and, of course, pricing, but it is easy to neglect support and productivity and, perhaps, pay too much attention to aesthetic things such as look and feel.



Functionality

I'll start with functionality because it is fundamental to any purchase decision. It's also a very hard one for buyers. Most software in market research has multi-functionality. By this, I mean that it is not merely carrying out one process in one way. For example, an online data collection tool may be converting respondents' answers from questions to a data file, which you could argue is one process, but it is achieving that by asking different types of questions with different routing, randomisation of answers etc.

How To Assess Functionality

As I have said, assessing functionality is difficult – it's easy to forget something and equally easy to get bogged down in unimportant detail. Some of our clients have produced checklists of 'must do' items, checklists of some detailed requirements and requested brief explanations of how specific tasks are carried out. This, I believe, works well as it ensures that key functionality is achievable, whether the software starts to become 'stretched' with more detailed needs (or, simply can't do some things) and brings greater understanding of how well the system works.

Price

Price is easy to assess. If it is outside your price range, it probably doesn't warrant further investigation. *Or, does it?* If the additional price brings greater productivity and it outweighs the staff cost of using software that is less productive, it makes sense to use the more expensive product. Yet, I see, for example, companies use free/cheap software for online surveys and neglect the cost of re-formatting the data or struggling with analysis later in the research process. I am frankly amazed at how some research agencies would rather save US\$1000 and buy an inferior software product when a more suitable product would save multiples of that amount. Buying something cheaper clearly makes sense if it makes no difference to using a more expensive product. This might sound like a software supplier asking potential buyers to spend more, but I think it is a genuine consideration.

Look & Feel

The appearance of a software package can have a big influence on a purchase decision – right down to the colour of the interface. I think 'ease of use' is confused with 'appearance'. Ease of use is important, particularly if use of the software by each user is infrequent or intermittent. Software that is intuitive is much better if someone is not using the product regularly. However, some products look appealing, but have features that are difficult to find or are organised in an illogical way. Knowing a rarely-used feature is present is all that is needed sometimes, but regularly used features should be convenient to use and find.

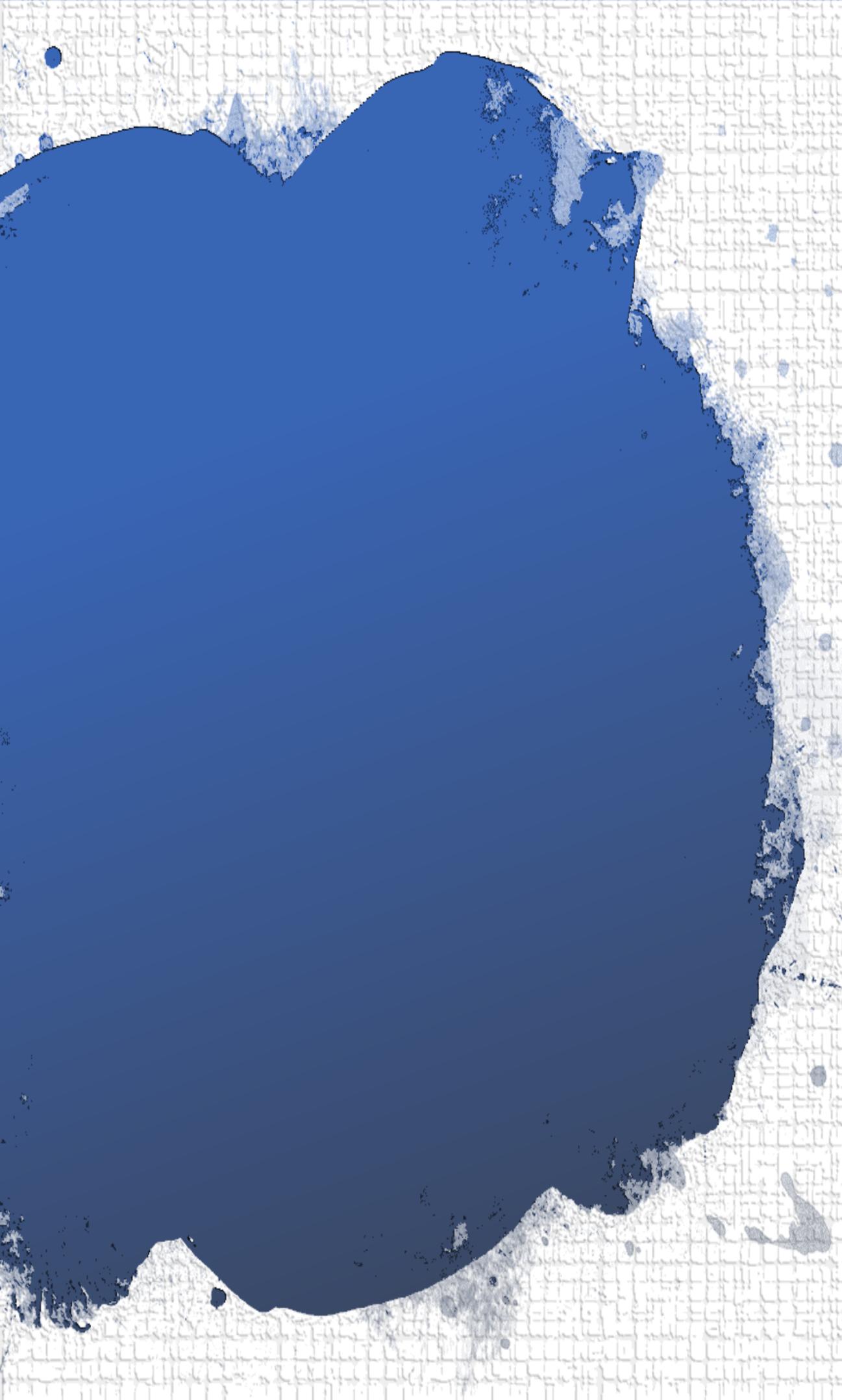
Let's now move on to some of the more practical software issues that are more likely to be overlooked.

Data Compatibility

As time goes on, there is an ever-increasing need to share data or use it in different software tools. It is, therefore, imperative that your data can be either imported, exported or transferred as required as easily as possible. If this becomes cumbersome or prone to human error, it might mean that you do not offer clients as much as you could or should – it might lead to mistakes and lose clients.

Your Needs – Fixed Or Uncertain

One important consideration that is often overlooked is the question of whether the projects that you are intending to use the software for are similar or different. The more flexibility you need, the more you will have to 'overbuy' so that the product you use can do everything you might want. If you work for a research agency that does almost identical surveys of one type, it is more likely that you can use a product that is just good enough. Of course, you don't always know what you might want in one or two years into the future, so this point goes hand in hand with the next point.



Scripting vs GUI (menu-driven software)

There are two types of software available – software that is driven by scripts using a programming language and software that is driven by making selections with a mix of keyboard and mouse using a GUI (graphical user interface). There are also some hybrids, which offer both, but there are some which look like GUI software but really need scripting to get anything out of them and, conversely, some that have some scripting, but it's just a few shortcuts.

The Costs Of Scripting vs GUI

Scripting and GUI software each have their advantages and disadvantages. Scripting will usually bring greater productivity in skilled hands, but those skilled hands are likely to cost more in staff salaries. GUI software will generally be easier to use, need less skilled staff and be less error prone. However, when scripting brings big productivity gains, it is the right course when there is the regular throughput of work for the users.

Training For Scripting vs GUI

Training can bring a hidden cost and is an important consideration when scripting software is used. I have heard of one supplier that sells its main product as 'easy to use' software using GUI. In practice, staff need to learn a complex scripting language which needs a minimum 3-day training programme and a lot of practice to become productive. Typically, GUI software can be used with minimal training and once one or two projects are completed, efficient work can be carried out. However, this doesn't mean that scripting is right if there is the right volume of work or complex needs.

Upgrade Path

I like to encourage potential customers to consider their future needs. If they are fixed, you don't need much of an upgrade path. If they are uncertain, there may be a need to upgrade. This may come in one of three forms:

- Buying into a superior package within the same software product (with more features/greater limits etc)
- Learning how to use more advanced features within the software product by training staff, recruiting more specialist/skilled staff
- Moving to another product that can handle the more complex needs

In the last of those cases, it is important to assess how easy it is to move to another product. Are you likely to be trapped in the current software product? This is hard to assess, but worthy of consideration as such a mistake can cost far more than a licence fee to use the software.

Frequency Of Use

Some products get easier to use if they are used more frequently or over a long period. The issue of scripting vs GUI overlaps with this point but assessing whether greater productivity can be achieved over time is an important consideration. Software that is 'clunky' tends to be just as slow to use with repeated use – expertise in the software does not pay back much. Scripting languages and more flexible GUI software packages tend to give more pay back as users find 'tricks' to improve productivity. Again, this is hard to assess, but is worth asking software suppliers before you buy.



Support

Evaluating support from potential software providers is difficult. The software provider can claim what they like, but it's hard to know what level of service you will receive until you have signed up. When evaluating a product you will become familiar with support levels and can make a clearer assessment.

Human Support

Regardless of whether you are talking about market research software, any other software or any form of customer service, some companies provide good a support service and some are impossible to reach. You can get some measure of this during software trials, but software companies may just be more responsive during trials as they see it as part of the sales process. Asking what is offered in terms of response times and availability at least means you have a commitment from any potential supplier and is always recommended.

Support Materials

Support materials are important. There is little excuse for software companies that don't have videos or tutorials to deal with onboarding and learning how to do all common tasks. I would add to this, where relevant, free project advice so that complex or unusual projects are handled in the best way. Too often, software users can struggle in ignorance when there are alternative approaches which are better suited to the software product you are using.

Are You A Typical Customer?

Some software suppliers will take any customers, but I think it was worthwhile trying to find out if you are a good fit in terms of the type of customer that uses a supplier's product. That's hard to do, of course, but telling a supplier about your ambitions will draw a response from a software supplier (or, they will ignore it and you can assume they are not a good fit). As a seller of software, I find it useful to understand what a potential client wants so that I can advise properly.

And, then, we come to the long term.

Here's two things to consider:

Long Term Productivity

Long term productivity is important. I am aware that I keep mentioning *productivity*, but it is often neglected and not always given due consideration. Some software packages have short cuts and tricks, allowing users to gain skills over time. Some software packages, on the other hand, have one way of doing things – they might do whatever it is efficiently or inefficiently, but there are no or few long-term gains. Again, it is worth exploring this with potential software suppliers.

Value

Price and value are often confused. Both the short and long-term value of a software investment are important. I actually believe it is worth producing a spreadsheet before a software purchase that details the value of the business the software will be used for, how important it is to that business, what the staff costs are (if it is multiple grades of staff, how much will be spent on each grade), how much training is needed, what risk there is to the business if the software proves inadequate and the long-term productivity gains. Your figures will only be estimates, but might help to focus on the value of your purchase and whether you are making the right decision.

And finally....

Does It Feel Right?

How you feel is important. Does the potential supplier talk your language? Do they work with companies like yours? Do they understand your needs? Are they people you can do business with? Some will say that this is the most important thing and they may be right in many cases, but I would advise not underestimate its importance.