// by Robert Farrell, president, Farrell Marcom LLC //

VETTING PROCESS

Five considerations when selecting a software partner

For fabricators that spend hundreds of thousands of dollars on equipment, it's easy to think of software as an insignificant purchase. Relatively speaking, most applications are small investments, and many are pretty much the same anyway, right?

While that might be true for some programs, estimating software can have a measurable and sustained impact on your bottom line, making it well worth your time and attention. After all, if you believe sales are the lifeblood of your business, then estimating software is arguably one of the most important purchases you'll make.

While the actual software itself clearly tops the list, there are a few things you should evaluate regarding the company behind that application – some obvious, others not so much. Here are five often overlooked areas to keep in mind when choosing an estimating software partner.

1. Quality

Quality is the foundation upon which all else rests; and while subjective and not easily measured, quality nonetheless is easily recognized – as is its absence. From the software product itself through development, customer service and beyond, quality permeates throughout all areas of a software provider that embraces it.

A software quality model from the American Society for Quality (ASQ) helps quantify the interpretation of quality and can be helpful when considering software quality. The model consists of a hierarchy of the following characteristics:

- Functional suitability: This includes the software's functional completeness, correctness and appropriateness.

- Reliability: This includes the maturity, availability, fault tolerance and recoverability of the system.

- Useability: From learnability through operability, appropriateness, recognizability, user error protection, user interface aesthetics and accessibility, the software should not burden the user.

- Performance efficiency: This includes time behavior, resource utilization and capacity.

↑ *When vetting a software provider, look for customer-driven companies that value the voice of the customer and leverage feedback for continuous improvement.*

- Security: Software confidentiality, integrity, non-repudiation, authenticity and accountability are important security considerations.

- Compatibility: This includes software interoperability and how it co-exists with other applications.

- Maintainability: This is modularity, reusability, analyzability, modifiability and testability.

- Transferability: How adaptive, easy to install and replaceable is the software?

"Integration is an important factor to consider," explains Dustin James, sales manager at Russel Metals. "As a sales manager, the last thing I want to discover is that our estimating software operates in a silo. A modern API allows software to ›
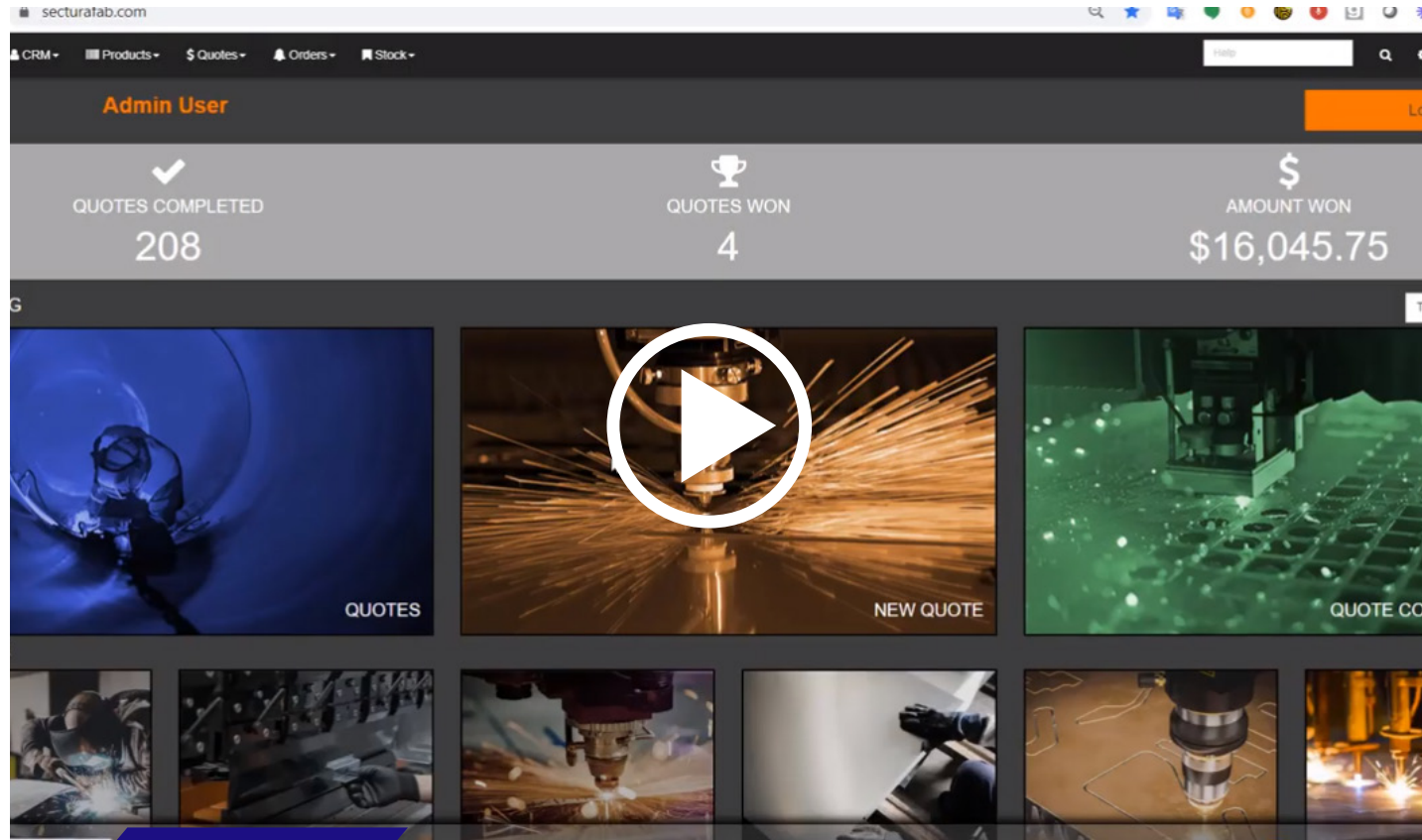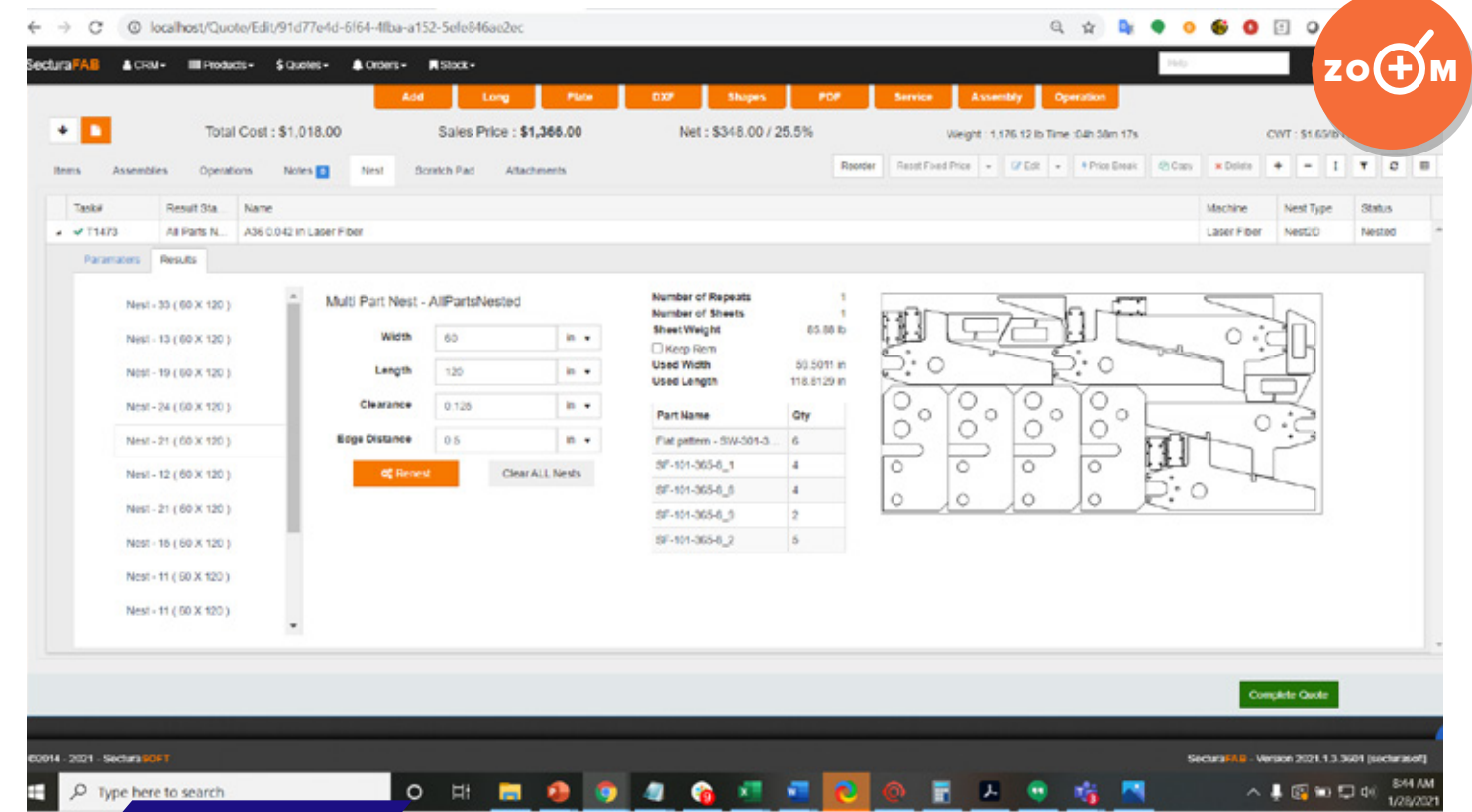
↑ *Watch the video to see how SecturaSoft estimating software allows for a seamless process from quote request to final estimate.*

Make no mistake, software should be your starting point and primary focus. So, investigate the market and kick the tires, benchmark functionality, check references, compare pricing and read reviews. Do your homework to ensure that vendors making the shortlist are financially stable and their software and services check all the boxes. Remember, you get what you pay for, so whenever possible, opt for quality over price.

Service, of course, plays into overall quality. A software partner invested in the success of its customers should routinely go above and beyond; and customers are the best source for this information. Ask for a list of current and past customers and investigate how they were treated throughout implementation, training and post-sale. Are they made to feel appreciated and supported? Do they feel as if input is encouraged, or do they only hear ❯

communicate with other systems, processes, business flows and so on. At Russel Metals, we routinely pull data from SecturaSoft quoting software for use in other places. Something like creating a parts library to build a repository of data for future use and references should be basic functionality and easily accomplished."

Additionally, James cites usability as a key indicator. "The software has to follow good practices and be easy to learn and use," he says. "This accelerates the onboarding process and makes it possible to pull in others as needed to create quotes. People come and go, and as a fabricator, you don't want to be at the mercy of a select few with a complex skillset."

↑ *Material utilization via effective nesting is a key component of the SecturaSoft estimating software.*

from the vendor when it's time for that maintenance renewal?

Reviews can be found easily enough online – but take anonymous posts with a grain of salt. Remember, it's easy for a competitor or a disgruntled ex-employee to trash a company.

Call the company's support line or contact them online. Are you speaking or chatting with a person? Are they radically responsive – or are you left wondering if their website is even working? Something as simple as a chat option on the website can be incredibly useful.

"I've probably used the SecturaSoft chat option 50 times, and 49 times I've gotten a response within the minute," James says. "The one time I didn't, it turned out that the office was closed for Thanksgiving day in the

United States. It would be very easy for a company to save some money on support or to say you'll get a response within 24 hours. But being radically responsive says a lot about the quality of the vendor.

"You can tell a lot about a company by the way it operates," he adds. "Everything from the software to the people who represent it are key components of the business. Are they responsive to questions? How they value support is a key indicator. You're making a long-term investment with this company and you want to know that they value your success as much as you do."

Ensure that training is readily available and is tailored to your needs, schedule and situation. If travel restrictions limit on-site training, what options does the vendor offer to ensure that training is effective?

People: How capable and experienced are the people you're working with? They may have software expertise, but what is their familiarity of the industry? A fabrication industry background goes a long way in understanding the challenges and variables your estimators and sales force face daily.

For example, based on experience in developing software for the metal fabrication industry, the advantage of a quoting solution to import a variety of file types empowers anyone in the organization to create estimates. >
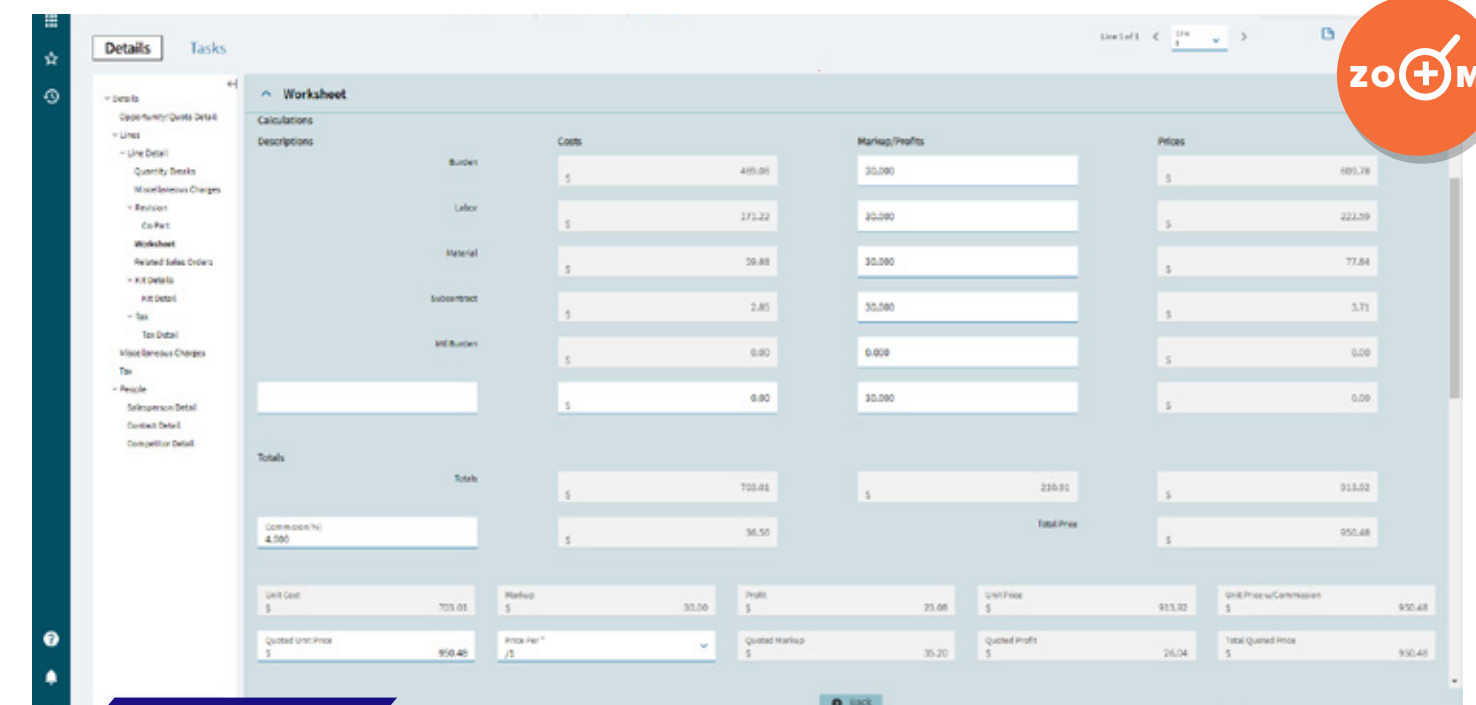
↑ *When a company values customer input, user-friendly software is the result. As just one example, Epicor makes it incredibly simple for users to add line items to their quotes.*

Democratized quoting allows practically any employee to contribute to the selling process. This eliminates the need for experienced engineers to spend their time supporting the estimating team.

2. Direction

The industry is evolving quickly and so are the technologies supporting it. You need to look no further than the shop floor. Fiber lasers, material towers, lights-out production, welding robots, automatic this, autonomous that. Quoting is no different.

Once considered the business tool, Excel broke onto the scene replacing paper spreadsheets. Today, its usefulness has been relegated to shopping lists and home budgets. Similarly, Blackberry and Blockbuster once dominated their industries. But a failure to anticipate changes in the market reduced them to a footnote in history. The business world is littered with companies that failed to adapt – make sure your software partner isn't going to be one of them.

Before hitching your wagon to a software vendor, ask their vision for five years, 10 years and beyond. Understand their roadmap for future releases and next-generation products. If you get a blank stare, maybe you should keep looking.

3. Listening

Customer feedback is priceless. As a fabricator who uses software in a real-world production environment, you have a lot of information to offer. Customer-driven companies value the voice of the customer and leverage feedback for continuous improvement. And, while it's not practical (or possible) to accommodate every customer request, all input should be noted and discussed.

"As an ERP product manager, listening to customers is a huge part of what I do," says Robert Brown at Epicor Software Corp. "This is where a lot of the product roadmap comes from. You want a software partner that has many ways for you to communicate directly with product management. Examples are product and customer advisory boards and user conferences. These are proven ways to build relationships with the folks that drive direction for the product."

Understand how information from the field is solicited and prioritized. If you get a watered-down response, press for more details. If you're left with an uneasy feeling, you should question how much interest is placed on customer feedback.

4. Relationships

Who does your partner call a partner? In today's digitally integrated world, no software operates on an island. It's critical that your estimating system interfaces with your ERP and other systems you may be using. Most companies proudly list alliances on their website. Look it over and ask what additional partnerships they have in place or are pursuing.

"We value the relationships we have with a number of ERP, CRM, >

↑ *Effective estimating software should take all fabricating steps into consideration when estimating costs. That includes processes such as welding and assembly.*

accounting platforms and integration specialists," explains Carissa Smith, marketing director for SecturaSoft LLC. "By understanding their solution or service offerings from the ground up, we're able to enhance our platform for a seamless integration for our customers. This allows for a single point of entry, reduced manual tasks and extreme visibility into their business."

Most companies will share their alliances openly with prospects and customers. Ask your software provider to be transparent with the relationships they've formed so you can have a better understanding of how your

systems can integrate for the most effective business process.

5. Trust

Do you like the people you're dealing with? For many, likeability is critical. You may be willing to pay a little more or even deal with a minor hassle or two if you genuinely like the software vendor and its people.

You may like them, but do you trust them? You're entrusting your software partner with sales and, indirectly, your company's future. You must be confident that the system is creating estimates that are fast and competitive, yet profitable.

The word transparency is tossed around so liberally that it seems to have lost much of its meaning. But trust and transparency go hand-in-hand. A trustworthy partner will expose you to development projects and timetables. And they will put their words into practice.

SecturaSoft, for example, adheres to the underlying agile principles of iterative, value-based incremental delivery by frequently gathering customer feedback and embracing change. This results in faster time to market, better delivery predictability, increased responsiveness, ability to change direction by managing changing priorities, enhanced software quality and improved risk management.

"We practice transparency by sharing facts via a shared Kanban board," says Valter Bonelli, SecturaSoft's director of process improvement. "Together with the customer, we inspect our product, processes and practices on a weekly basis. In this way, we're continuously improving them. The team openly shares the increment at the end of each sprint to gather valuable feedback. Changes are welcome as an opportunity

to collaborate and clarify requirements and test the new hypothesis. We are convinced that encouraging and embracing this feedback is critical to continuous improvement."

In the end, you're buying software, not spending hundreds of thousands of dollars on a cutting machine, so, you're naturally going to be tempted to go with whatever fits the budget. But it's an important purchase that will drive sales, win contracts, pay the bills and, ultimately, keep that machine cutting.

Benchmark performance, look at your budget and determine if the solution is scalable to grow with your business. In addition, be sure to look at the company behind the software and the people behind that company. Does the perfect software provider exist? It most certainly does not; but a software partner who is perfect for you just may. ■

SECTURASOFT LLC →

EPICOR SOFTWARE CORP. →

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