

# Off-the-Shelf Software or a Custom Build?

A scorecard — fill one in per process. Score each line from 1 to 5: 1 = firmly the left column, 5 = firmly the right. The form does not make the decision; it makes visible what you are deciding on.

Which process is this for

Process owner

Date

| #     | Points to off-the-shelf                                      | Points to a custom build                                          | Score (1-5) |
|-------|--------------------------------------------------------------|-------------------------------------------------------------------|-------------|
| 1     | Everyone in the industry runs this process much the same way | This process is where we differ from competitors                  |             |
| 2     | Bending the process to fit the software costs us nothing     | Change the process and we lose customers or quality               |             |
| 3     | There are more than three mature products doing this         | We looked; nothing off-the-shelf fits us                          |             |
| 4     | Few users, all of them in the office                         | Many users across field, production and office roles              |             |
| 5     | Data volume and integrations are simple                      | It has to exchange data with several other systems                |             |
| 6     | The budget must be predictable; we cannot absorb surprises   | We can spread the budget over several years                       |             |
| 7     | Nobody inside can own this                                   | A person who knows the process can own it and give it weekly time |             |
| 8     | It has to be working within three months                     | We can wait six to twelve months                                  |             |
| 9     | If the system stops, the business keeps running              | If the system stops, production or dispatch stops                 |             |
| 10    | This process will look the same in five years                | This process will be unrecognisable in five years                 |             |
| TOTAL |                                                              |                                                                   |             |

## What the score says

|         |                                                                                                                                |
|---------|--------------------------------------------------------------------------------------------------------------------------------|
| 10 - 24 | Buy. A custom build burns money and time here; what you want is already on the market.                                         |
| 25 - 37 | Hybrid. Off-the-shelf core, custom only at the edge where your difference lives. For most businesses this is the right answer. |
| 38 - 50 | Build. But write the three lines below first — projects that start without them do not finish.                                 |

### Three lines to write before you start

- STOP CRITERION: by what date, and failing which result, do we stop this project? A criterion not written at the start never gets written.
- DATA OWNERSHIP: can we export our data whenever we want, and in what format? Is it in the contract?
- PILOT SCOPE: which single department or site goes first? Rolling out to the whole company at once hides problems rather than fixing them.