

# What to Know Before Choosing Business Software

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## **1. Start with a Clear Business Goal**

Before evaluating features, define what you want to achieve—whether it's automating billing, improving customer onboarding, or integrating multiple systems.

## **2. Map Out Current Workflows**

Document how things work today so you can identify gaps or inefficiencies. This makes it easier to spot what the software must do.

## **3. Prioritize Integrations**

Make sure the tool plays nicely with your existing systems like Salesforce, QuickBooks, or HubSpot.

## **4. Don't Overbuy on Features**

Choose a platform that's right-sized. Start with essential functionality and expand later.

## **5. Get Real Support**

Choose a partner like Square One that offers expert onboarding and real support—so you're never stuck post-purchase.