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By Judie McCarthy.

If you're just joining us now, we're in Part 2 of a series on the steps to finding the right software solutions to run your firm. We encourage you to read Part 1 ([here](#)) before moving on to the rest of this article. ([Go to Part 1.](#))

In the first part, we discussed pertinent topics, such as:

- Determining the solutions you have in place

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Steps 5-8: Finding the Right Software Solutions for Your Firm

5. Pricing and Your Budget

Price can lead to sticker shock for a lot of firms. Often, people think, “it’s going to cost that much?!” This can lead them to miss out on a solution that can supercharge their firm in ways that manual work cannot.

Instead, you need to look at the price in terms of value to judge whether a solution is right for you.

For example, let’s assume that a practice management solution will cost you \$60 a month per user. You might think that it’s too expensive, but let’s break down the pricing to reveal the true cost of this software:

- \$15 a week
- \$3 a business day

If an accountant in your firm saves even 10 minutes a day, you’re going to benefit from the software. As you can see, looking at software pricing alone isn’t a good way to evaluate the true cost. You must also consider the value the software provides.

When evaluating the pricing of a software solution, I also recommend considering the following:

- Pricing model. What type of pricing model is the software on? Do you pay monthly, quarterly, or annually? Are you stuck in a contract? Does the pricing have tiers that you can upgrade or downgrade to freely?

- Client-facing. If the software is client-facing, what costs will be involved for each

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6. Understanding Training and Onboarding

Even the best user interface and software in the world have a learning curve. You'll need to view training and onboarding in two ways:

1. First, what level of training and onboarding is offered? Is the training free or is there a fee attached?
2. Second, what level of commitment do you need to make? Time is money.

Additionally, you'll want to consider the training and onboarding for your staff. If there are no online training materials, will the developer offer to train your staff for a fee? While training might not be as big of an issue for a small firm, trying to train dozens of employees can turn into a logistical nightmare without the proper support.

Even if these services have a fee, they can help reduce the learning curve for your team to make the transition to the solution easier for everyone involved.

At ClientHub, we quickly realized just how important training and onboarding were to our clients. We help make the transition a bit easier with:

- A guide that outlines key features and how to use the platform
- Demos, which show quick demonstrations of the power of the platform
- Onboarding solutions and US-based support that make the transition easy for clients

If you don't know what type of onboarding or training is available, just ask. In fact, this is the optimal time to reach out to support and see how quick their response time

is.

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- Is support offshore or US-based?
- Human contact is also very important. It's been found that **75%** of people prefer to speak to a real person when they have an issue. If the software solution doesn't enable you to get in touch with support directly, consider how that may impact your experience.

Your firm is going to rely on the software solutions you choose. If support isn't responsive, convenient, or conducive to your choice of interaction, reconsider your choice. Issues can and likely will come up with software, and if there's no reliable point of contact, it will cost your firm time and money in the long term.

You've almost made your decision on the right software for your firm, but before you do, it's crucial to consider a few additional things.

8. Don't Forget to Consider a Few Other Things

Finally, you've made it to the last step, and there are just a few additional things that you should consider here. First, can the software scale with your firm as it grows? For example, can you easily add additional users to the software?

Secondly, one last thing to note is not to get caught up in features that you'll never use. If there are 10 features that you'll use and 15 that you won't, consider if you're overbuying. Seek to find a software solution that fits your needs closely.

Of course, if you do plan on needing those features in the near future, the software may not be an overbuy.

Wrapping Up

If you underestimate the importance of your tech stack and software solutions, you'll

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Judie McCarthy is a QuickBooks ProAdvisor (Advanced Certified), speaker, author, experienced accounting professional, and co-founder of Client Hub. Client Hub is a one-of-a-kind, all-in-one web-based, frictionless workflow and client collaboration tool built for accounting professionals. Client Hub takes communication out of cluttered, unsecure email inboxes and into a secure, firm branded workspace. To get in touch with Judie or schedule a demo of Client Hub, [click here](#).

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