



## Business Yield's Checklist For Choosing The Best Revenue Intelligence Software

The checklist below will help you select the revenue intelligence software suitable for your business:

- Assess Your Business Needs:** In other words, what kind of revenue intelligence software do you need?
- Assess the Software Features:** The exact features you'll look out for must align with your business needs. In addition to your specific business needs, look out for features like lead management, pipeline management, analytics, forecasting, automation, customization, and integration.
- Assess Data Quality and Accessibility:** What's its data source, how accurate are the results of its analytics, and is this information accessible in real time?
- User Experience and Interface:** Here, you should consider its ease of use and mobile accessibility.
- Assess the Security and Compliance:** In terms of data security, what measures are in place to ensure the security of sensitive sales data and customers' information? Secondly, does the software comply with relevant data protection regulations (e.g., GDPR, CCPA)?
- Assess Scalability and Integration:** Can the software accommodate the needs of growing businesses and larger datasets? Secondly, how well does it integrate with other essential business tools and systems?
- Assess the Cost and ROI:** What is the pricing model (e.g., subscription-based, per-user, tiered pricing)? Does the software offer features and insights that can contribute to increased revenue and cost savings?
- Trial and Demo:** Does the vendor offer a free trial or demo period for businesses to evaluate the software before making a purchase decision?
- Training and Support:** Are there training materials and resources available for users to get acquainted with the software? What level of customer support is provided (e.g., live chat, phone support, email)? Is there an active user community or forum where users can seek advice and share experiences?