

Choosing a Business Platform

Compare platforms against your workflows and operating needs.

1. Start with the purpose

List essential tasks, users, approvals and reporting needs. Identify which existing records must move and which systems must remain connected.

2. Prepare the approach

Prepare a consistent demonstration script using your own representative scenarios. Ask each option to show exceptions and reporting as well as the ideal workflow.

3. Test the decision

Compare implementation, subscriptions, support, integrations and exit costs. Check role permissions, data export options and the responsibilities retained by your team.

4. Review and improve

Pilot the strongest option against agreed acceptance criteria. Record unresolved gaps, migration work and training needs before making a final commitment.

Your next step

Record your priority, the person responsible, the evidence you need and the next review date. Use the framework to support a discussion with your team; adapt it to your organisation and seek relevant specialist advice where needed.

Discuss implementation: WhatsApp +2348033946516