



5-POINT CHECKLIST FOR

EVALUATING NEW BUSINESS MANAGEMENT SOFTWARE

for Promotional Products Distributors



Evaluating & Comparing Promotional Products Software

At [commonsku](#), we know that evaluating software to run your business can be a daunting task. If you've made it this far, it's clear you've made the decision to invest in the growth of your business by exploring promotional products software. You're well on your way to improving your life as an owner, the lives of your employees, and the lives of your clients. Congrats!

You want to make the right choice for your team, and your clients, that combines functionality with style, organization with flexibility, and creativity with commerce...easier said than done, right? It's no secret that there are a number of options on the market for you to consider; commonsku, Facilis, Anterra, Essent, and more, offering solutions based on your company's specific needs and wants.

Here at commonsku we've helped hundreds of distributors just like you evaluate their software needs, and determine their best fit. Based on this knowledge, we've created 5 critical considerations when evaluating promotional products software:

1. Map Your Current Process

Before you jump into the technology solutions themselves, it's important to completely understand your workflow. Start from the prospecting stage for a new client and document each step through the process of landing their business, ideation and presentation of product, through to invoicing, shipping and accounting, and document who is responsible for each step.

It may seem simple, but documenting this information ensures that you convey your company accurately during the evaluation process, and also creates a framework of how the software you ultimately choose needs to be structured.

Did you know that [commonsku](#) was created for distributors, by distributors? Unlike many competitors with backgrounds outside of the promotional products industry, our co-founders Mark and Catherine Graham, launched commonsku to run their distributorship at the time, [RIGHTSLEEVE](#), after identifying a gap in the market for beautiful, functional, and responsive software. They deeply understand the workflow of the hardworking distributors in the promotional products industry, and the unique challenges they face, and so they set out to change the software game with commonsku!

2. Determine Your Needs

Based on the work you completed in step 1, identify the areas your team is crushing it, areas you could improve, and any serious pain points you are looking to solve.

What features would help plug the holes in your workflow? Maybe it's a built in ecommerce solution for your reps, a stellar email marketing integration, or a client portal system to ease communication challenges. Whatever the case may be, identifying your needs enables you to eliminate any software provider from consideration that lacks the basics you're looking for.

For example, over the past decade, the ability to provide clients with effective, beautiful, and easy to use e-commerce stores has become a necessity for many companies to remain competitive.

Through the commonsku platform, all users have access to [commonsku Shops](#), an easy to use, quick-ordering solution for your client. With three types of Shops to suit any need your client may have, commonsku Shops can be built and running in just minutes without the complications of inventory, purchasing methods, or multiple data entry.

Forget the hassle of stacking an additional technology platform onto your plate and disrupting your workflow; with commonsku's native ecommerce solution, commonsku Shops, you'll never miss out on this crucial business opportunity.

3. Prioritize Your Needs

So you completed steps 1 and 2 of this exercise, and now have a laundry list of features, integrations, and offerings, you're looking for in your dream platform a mile long. What now?

It's time to prioritize! To avoid analysis paralysis, rank your list from "must-haves" to just "nice-to-haves". Aim to remove 90% of the pain points from your current process with your software solution using this list.

Setting these internal expectations for yourself ensures that you don't become overwhelmed during the evaluation process and can effectively sift through the noise and arrive at what your team really needs.

We've all seen it before, technology partners that claim to be the jack of all trades, but ultimately end up being the master of none. At commonsku, we're very clear on who we are and what we do. We offer beautiful, unified, workflow management software for your promotional products business from ideation to invoicing. [Enter: seamless and sophisticated integrations](#) for businesses of all sizes! QuickBooks, Xero, Avalara, Stripe, Cloverconnect, Mailchimp, and Hubspot, are just a few of our extremely powerful direct integrations with commonsku. What does this mean for you? Best in class comprehensive services specific to your business needs...you really can have everything on your wishlist!

4. Staying Connected with Your Supplier Partners

Working with trusted suppliers within the promotional products industry can make all the difference when it comes to executing your clients' orders. Check in with your top partners and make them aware of your search for a software provider. Often, they'll hold valuable information on which platforms make it easy to form quality relationships and transactions, and which inhibit it. It's also critical to consider which platforms are taking PromoStandards integrations seriously, and include it directly within their software for ease of use.

The commonsku platform is specifically designed to make the relationship between distributors and suppliers seamless, while helping you discover new trusted partners! With over [100 supplier partners, and over 15 connected to PromoStandards](#), you can rest assured that our community based news feed, and collaborate functions, mean that suppliers will be bringing ideas directly to you for your specific project, not the other way around!

5. Furthering Your Education and Network

The promotional products industry is filled with twists and turns on the daily! Often, it takes a village to execute perfect projects for your clients from your supplier partners, to your peers, and educational resources. Once you've dug into the technology platform and feel confident in the software offering, be sure that you consider the community, events, and educational offerings associated with the provider...they could make all the difference for you and your team!

commonsku is more than just a software provider. We've curated an entire promotional products ecosystem to help the modern promotional products distributor succeed. From free weekly blog content, podcast episodes, and eBooks to [best in class in-person and virtual events](#), our community is invested in knowledge sharing, and cultivating a better way to work. A rising tide lifts all ships, and you'll always have a friend to turn to if you need expertise.

When you become a commonsku user, you're unlocking a community of forward thinking industry colleagues, and unlike platforms that do not offer additional education and event opportunities, we won't leave you in the dark after onboarding.

Now that you've taken the time to evaluate your business, your potential software offerings, and the needs of your unique business, we hope you feel prepared to move forward in your software evaluation journey and determine the best fit for your team and your clients.

commonsku is an effortless business management platform that empowers you to process more orders and handle more business. We would love to invite you to join us for an [exclusive 1-on-1 demo](#) to see how our CRM, Order Management, and E-Commerce platform can grow your business!



comonsku