

# The Decisioning Software Buyer's Guide: Top 10 Recommendations for Success



# Introduction

Enterprise software purchases inherently involve long sales cycles and multiple stakeholder groups, but **automated decisioning solutions** add another layer of complexity to an already challenging process. While some organizations seek to transform their operations by empowering business users to manage decisions directly, others focus on modernizing their IT infrastructure and processes.

The Sapiens Decision team has worked with numerous organizations across banking, insurance, and other industries, witnessing firsthand how these varying approaches and objectives can create unique challenges during the software acquisition process.

Drawing from our extensive experience helping organizations transform their business rules and decision management practices, we've identified **the top 10 requirements for successful software implementation.**

While every organization's journey is unique, there are common pitfalls that can be avoided with **proper planning and execution.** Whether you're looking to modernize your existing rules engine or implement automated decisioning for the first time, this guide will help you navigate the process successfully.

The transition from traditional rules management to automated decisioning represents a significant change in how organizations operate. Beyond the technical aspects, it requires careful consideration of governance, roles and responsibilities, and change management. **This guide will help you address these challenges proactively, ensuring a smoother implementation and better outcomes.**





# The Top 10 Recommendations

1. Initial Discovery & Needs Assessment
2. Vendor Evaluation & Shortlisting
3. Business Case & ROI Justification
4. Proof of Value (PoV) / Proof of Concept (PoC) / Guided Trial
5. Technical & Security Assessment
6. Procurement & Legal Review
7. Executive Approval & Budget Sign-Off
8. Change Management
9. Implementation & Deployment
10. Post-Implementation Review & Optimization



# 1 Initial Discovery & Needs Assessment

The foundation of any successful software purchase lies in a thorough understanding of your organization's needs and challenges. Many projects stumble because technical buyers lack familiarity with business challenges, while business owners may not understand technology constraints. This phase is crucial for aligning business and technical stakeholders and establishing clear objectives that will guide the entire process.

## Key Requirements:

- Identify business challenges and objectives
- Gather stakeholder input from Business, IT, Security, and Procurement
- Define key success criteria and desired outcomes
- Research potential vendors and solutions
- Establish joint Business/IT sponsor team for project oversight and alignment
- Align internal budget and executive sponsorship



# 2

## Vendor Evaluation & Shortlisting

Selecting the right vendor requires looking beyond feature lists and marketing materials. Organizations often base decisions on incomplete information or fail to consider how different solutions align with their specific needs. This section helps you develop a structured approach to vendor evaluation that ensures you're making well-informed decisions.

### Key Requirements:

- Conduct market research on available solutions
- Evaluate vendor reputation, case studies, and customer references
- Compare features, scalability, integration capabilities, and product roadmaps
- Shortlist 2-4 vendors for deeper evaluation

# 3

## Business Case & ROI Justification



A robust business case is essential for securing buy-in and maintaining project momentum. Too often, organizations proceed without clearly quantifying benefits or understanding total costs. This section provides a framework for building a compelling business case that addresses both immediate and long-term considerations.

### Key Requirements:

- Quantify expected business impact (cost savings, efficiency, revenue)
- Conduct total cost of ownership (TCO) analysis
- Compare licensing, subscription, and pricing models
- Identify any cost implications for scaling usage over time
- Prepare a formal business case for executive approval

# 4 Proof of Value (PoV) / Proof of Concept (PoC) / Guided Trial

The proof of concept phase is critical for validating assumptions and building confidence in a solution. However, without clear success criteria and proper planning, POCs can drift and fail to deliver meaningful insights. This section helps you structure your POC for maximum value.

## Key Requirements:

- Define the scope of the PoC or trial
- Ensure alignment with real-world use cases and key success metrics
- Secure necessary IT support for deployment
- Run PoC with actual or synthetic data
- Measure performance, usability, and business impact
- Gather user feedback and document findings
- Consider the vendor's partnering approach to ensure a good culture fit





# 5

## Technical & Security Assessment



In today's complex technology landscape, thorough technical and security assessments are non-negotiable. This phase ensures that your chosen solution will integrate properly with existing systems while meeting all security and compliance requirements.

### Key Requirements:

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- Conduct total cost of ownership (TCO) analysis
- Compare licensing, subscription, and pricing models
- Identify any cost implications for scaling usage over time
- Prepare a formal business case for executive approval



# 6 Procurement & Legal Review

Negotiating contracts and terms requires careful attention to detail and a clear understanding of your organization's needs. This section helps you navigate the procurement process while ensuring your interests are protected.

## Key Requirements:

- Avoid re-work by consulting with your procurement team early in the buying journey
- Engage procurement team to negotiate pricing and terms
- Review licensing agreements, service level agreements (SLAs), and contract terms
- Address data ownership, support, and renewal terms
- Obtain legal approvals for compliance with company policies





# 7

## Executive Approval & Budget Sign-Off

Securing executive approval requires more than just presenting technical capabilities. This section helps you build a compelling case that addresses executive concerns and demonstrates clear business value.

### Key Requirements:

- Present findings to key decision-makers
- Secure CFO, CIO, or other relevant executive sponsorship
- Finalize contract and payment structure

# 8 Change Management

Successfully transitioning to automated decisioning requires more than just implementing new technology. It demands a structured approach to organizational change that addresses both business and IT perspectives. This phase is crucial for ensuring that your organization can fully leverage the new capabilities while maintaining operational effectiveness during the transition.

## Key Requirements:

- Assess organizational impact on processes and roles
- Consider operating model between Business and IT teams
- Implement strategic communication plan targeting impacted stakeholders
- Define new roles and develop targeted training programs
- Create a [Center of Excellence \(COE\)](#) to drive adoption and excellence





A decorative graphic in the top right corner featuring a large green circle with three white concentric circles inside. A large, light green arrow points from the bottom left towards the center of the concentric circles. Below the green circle is a blue circle, and at the very bottom is a light blue circle. The circles and arrow are layered, creating a sense of depth.

# 9

## Implementation & Deployment

A successful implementation requires careful planning and coordination across multiple stakeholders. This section helps you prepare for the transition, particularly when moving to automated decisioning solutions where roles and responsibilities may shift significantly.

### Key Requirements:

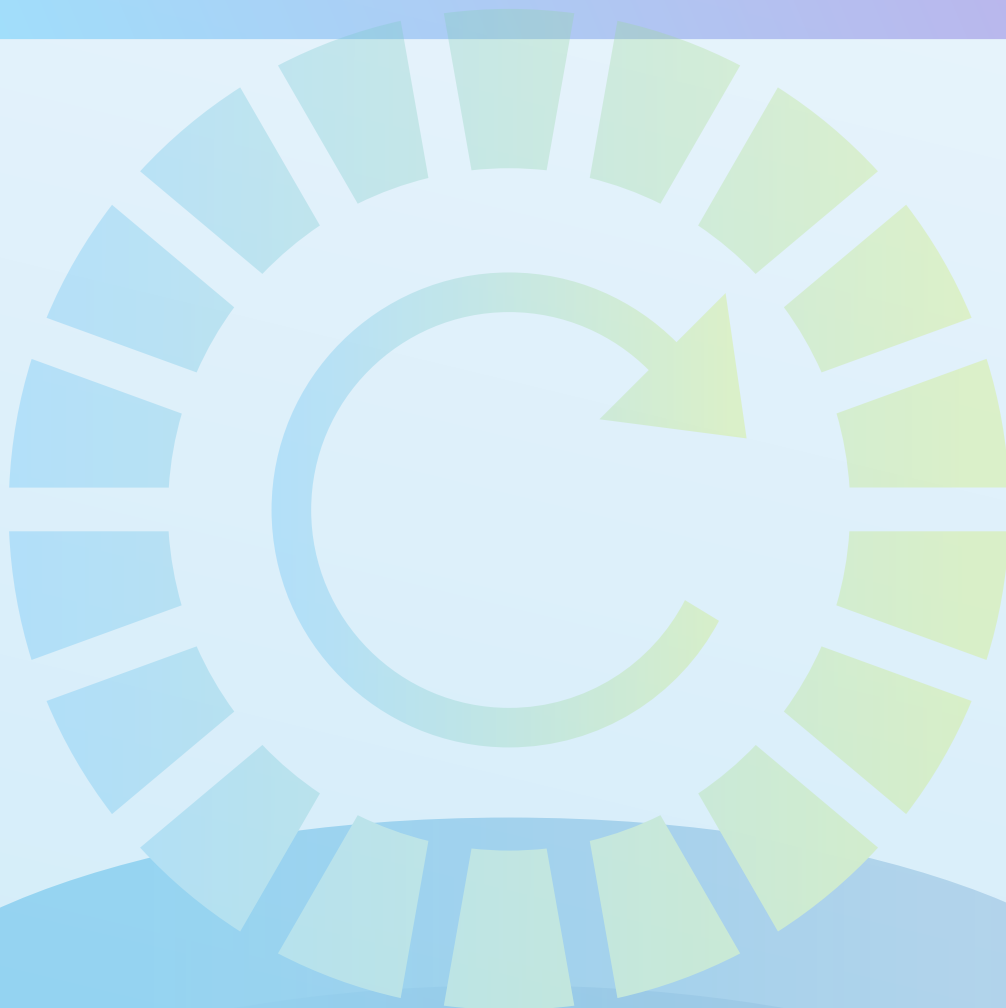
- Develop an implementation plan with the vendor
- Assign project owners for deployment and change management
- Conduct user training and adoption programs
- Establish ongoing vendor support and escalation processes
- Plan for post-implementation review and optimization

# 10 Post-Implementation Review & Optimization

The journey doesn't end with deployment. Regular review and optimization ensure you achieve and maintain the expected benefits from your investment.

## Key Requirements:

- Monitor system performance and user adoption
- Track KPIs against initial business objectives
- Schedule periodic vendor performance reviews
- Identify opportunities for further optimization and expansion



# Summary and Next Steps

Successfully implementing enterprise software, particularly decision automation solutions, requires careful planning and execution across multiple dimensions. This guide provides a framework to help you navigate the process, but every organization's journey is unique.

Sapiens Decision brings deep expertise in helping organizations transform their decision management practices. We understand the technical, organizational, and change management challenges involved in moving from traditional rules management to automated decisioning.

## Ready to start your journey toward better decision automation?

Contact Sapiens Decision today to discuss how we can help you achieve your objectives while avoiding common pitfalls in the software buying process. Our team of experts is ready to guide you through each step of the journey, ensuring your success in implementing automated decisioning solutions.

## About Sapiens Decision

Sapiens Decision is a division of Sapiens International Corporation (NASDAQ and TASE: SPNS), a global leader in digital software platforms, solutions and services. Sapiens Decision transforms how businesses are approaching change through decision management. Sapiens Decision is used by major corporations in banking, insurance, retail, and public sector to implement process automation and drive digital transformation.

For more information: [www.sapiensdecision.com](https://www.sapiensdecision.com)

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