

Supplier Comparison & Recommendation

ILLUSTRATIVE EXAMPLE

18-person B2B professional services company

Decision:

Customer-management solution selection

Options:

Solution A · Solution B · Solution C

Not client work

Example of how ActiveHub compares competing solutions against the actual requirements of a small business and makes an independent recommendation.

Supplier Comparison & Recommendation

BUSINESS PROFILE	18-person B2B professional services company
DECISION	Select a customer-management solution for enquiries, customer information, quotations, follow-up and basic pipeline visibility
OPTIONS CONSIDERED	Solution A, Solution B and Solution C
PURPOSE	Determine which option best fits the business's current requirements without introducing unnecessary cost, complexity or dependency.

Which solution should this business choose?

The three options considered could all support part of the requirement.

They differ significantly in:

- ease of use
- capability depth
- implementation burden
- ongoing administration
- fit with existing tools
- future flexibility
- supplier dependency

The most capable option is not the recommended option.

RECOMMENDATION

Choose Solution A for the current requirement.

Solution A provides the best balance between:

- current business needs
- usability
- sufficient capability
- manageable change
- ongoing administration
- future flexibility

Solution B provides greater capability, reporting and automation potential, but the business does not currently need enough of that additional capability to justify the extra complexity.

Solution C reduces change by remaining closer to the existing software environment, but it leaves important customer-management and pipeline needs only partly addressed.

OVERALL CONCLUSION

Solution A is the strongest overall fit because it solves the important current problems without requiring the business to take on capability and complexity significantly ahead of need.

Recommendation by option

OPTION	OVERALL RECOMMENDATION	WHY
A Solution A Simple specialist solution	→ RECOMMENDED	Best balance of requirement fit, usability, capability and manageable complexity
B Solution B Broader configurable platform	≡ DO NOT SELECT FOR THE CURRENT REQUIREMENT	Strongest capability, but disproportionate complexity and administration for present needs
C Solution C Capability within existing software ecosystem	● DO NOT SELECT AS THE PRIMARY SOLUTION	Lowest change burden, but leaves important customer-management needs insufficiently addressed

IMMEDIATE DECISION

Proceed to practical validation of Solution A before making a longer-term commitment.

Confirm:

- actual commercial terms
- migration needs
- export capability
- licence requirements
- integrations
- support
- workflow fit
- access controls
- security/privacy documentation

Where commercially practical, avoid unnecessary long-term commitment until usability and operational fit have been demonstrated.

Business requirement

Business context

The illustrative business has 18 employees and provides professional services to other businesses.

Customer-related work currently involves a mixture of:

- email
- spreadsheets
- shared documents
- individual employee records
- existing office software

The business does not have a dedicated technology team.

Management wants better control over the customer and opportunity process without creating a large software project.

Current problems

The business wants to improve:

- visibility of new enquiries
- consistency of customer information
- ownership of opportunities
- quotation tracking
- follow-up
- basic pipeline visibility
- management visibility of current opportunities

Current information is fragmented.

Different employees may maintain different records, and some important follow-up depends on personal memory.

What management does not want

Management does not want to:

- replace more systems than necessary
- create a long implementation programme
- introduce excessive administration
- pay for advanced functionality that is unlikely to be used
- become unnecessarily dependent on one supplier
- create a solution that requires specialist internal administration

ASSESSMENT QUESTION

Which solution provides enough capability for the business's current needs without creating unnecessary cost, complexity or dependency?

What actually needs to be solved

The business does not need the most comprehensive customer-management platform available.

It needs a reliable way to manage a defined set of operational requirements.

— REQUIREMENT 1

Enquiry capture

The business should be able to record:

- who has made contact
- which organisation they represent
- what they are asking about
- who owns the enquiry
- what should happen next

— REQUIREMENT 3

Opportunity ownership

Each active opportunity should have:

- a clear owner
- a status
- a next action

— REQUIREMENT 5

Follow-up

Routine follow-up should be easier to organise consistently.

The solution should reduce dependence on individual memory.

— REQUIREMENT 7

Reporting

Basic operational reporting should be available without requiring significant specialist administration.

— REQUIREMENT 2

Customer information

Employees need a consistent place to view important customer and contact information.

This should reduce dependence on:

- individual inboxes
- personal notes
- separate spreadsheets

— REQUIREMENT 4

Quotation visibility

The business needs to know:

- which quotations are being prepared
- which have been sent
- which require follow-up
- what outcome was recorded

The system does not need to replace specialist financial or document software merely to achieve this.

— REQUIREMENT 6

Pipeline visibility

Management needs a simple view of:

- open opportunities
- stage/status
- owner
- expected next action
- recent activity

The business does not currently require a highly sophisticated forecasting environment.

— REQUIREMENT 8

Practical adoption

Employees should be able to use the system consistently without substantial technical expertise.

The value of the solution depends on reliable use.

Options considered

The options are illustrative. They do not represent named vendors.

A Solution A Simple specialist solution OVERALL → RECOMMENDED STRENGTH Best balance TRADE-OFF Less advanced than Solution B. A dedicated customer-management solution focused on common small and medium business requirements. STRENGTHS - straightforward user experience - strong coverage of core customer-management needs - relatively low administrative burden - suitable pipeline and follow-up functionality - sufficient reporting for the current requirement - reasonable room for future growth LIMITATIONS - fewer advanced capabilities than Solution B - less flexible for highly specialised future processes - some additional software adoption is required INITIAL VIEW Strong fit for the current requirement.	B Solution B Broader configurable platform OVERALL DO NOT SELECT FOR THE CURRENT REQUIREMENT STRENGTH Most capable TRADE-OFF More complexity, administration and dependency than current need justifies. A more extensive platform offering deeper configuration, automation, reporting and expansion options. STRENGTHS - strongest overall capability - extensive configuration potential - advanced reporting - stronger automation potential - greatest capacity to support future complexity LIMITATIONS - greater setup burden - more choices to configure and govern - higher ongoing administration - larger dependency on the platform - increased risk of buying capability the business does not currently need INITIAL VIEW Very capable, but likely more complex than the current requirement justifies.	C Solution C Capability within existing software ecosystem OVERALL DO NOT SELECT AS THE PRIMARY SOLUTION STRENGTH Least disruptive TRADE-OFF Leaves important customer-management needs insufficiently addressed. A customer/opportunity-management capability available within software the business already uses or an adjacent part of that ecosystem. STRENGTHS - lowest organisational change - familiar user environment - strong fit with existing tools - potentially easier identity and information integration - reduced number of unrelated platforms LIMITATIONS - weaker specialist customer-management capability - less polished pipeline experience - weaker reporting for the intended use - more compromises may be needed - some manual work may remain INITIAL VIEW Operationally convenient, but does not solve enough of the underlying requirement.
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Evaluation criteria

Each option was assessed against the business requirement rather than against the longest possible feature list.

The assessment considers:

Current requirement fit

Does the option solve the problems the business needs to solve now?

Change burden

How much organisational change is required before useful adoption?

Existing-tool fit

How well does it fit with the software environment already in use?

Automation potential

Can useful routine processes be supported without excessive complexity?

Ongoing administration

How much internal effort is likely to be required to maintain the system?

Supplier dependency

How difficult could it become to change direction later?

Reversibility

Can the business change course without disproportionate disruption?

Ease of use

Can employees reasonably use it consistently without specialist expertise?

Capability depth

Does the option provide sufficient functional capability?

Reporting

Does it provide the level of visibility the business actually needs?

Information handling and access controls

Can access and information responsibility be managed appropriately?

Future scalability

Can the option accommodate plausible future growth?

Commercial model

Are the expected licence and commitment structures proportionate to the need?

Overall complexity

Does the option introduce more system, process and governance complexity than the problem requires?

Comparison matrix

The ratings are qualitative decision aids. They are not claims of mathematical precision.

	A Solution A Best overall fit Recommended	B Solution B Most capable More than currently needed	C Solution C Least disruptive Leaves important gaps
CRITERION			
Current requirement fit	Strong	Strong	Adequate
Ease of use	Strong	Adequate	Good
Change burden	Good	Weak	Strong
Capability depth	Good	Strong	Adequate
Existing-tool fit	Good	Adequate	Strong
Reporting	Good	Strong	Adequate
Automation potential	Good	Strong	Adequate
Information/access controls	Good	Strong	Good
Ongoing administration	Good	Weak	Good
Future scalability	Good	Strong	Adequate
Supplier dependency	Good	Weak-Adequate	Good-Strong
Commercial flexibility	Good	Adequate	Good
Reversibility	Good	Adequate	Strong
Overall complexity	Good	Material concern	Good
Overall fit	→ RECOMMENDED	More than currently needed	Leaves important gaps

Interpretation

Solution B performs strongly in several individual capability categories.
That does not make it the strongest overall fit.

The assessment considers the relationship between:

- benefit
- current need
- complexity
- adoption
- dependency

Solution A performs well across the important criteria without creating a material weakness in the areas the business needs now.

A

Solution A

Simple specialist solution

OVERALL ASSESSMENT

→ RECOMMENDED

Solution A provides the strongest balance between current requirement fit and manageable complexity.

Requirement fit Strong The option supports: – customer/contact records – enquiry/opportunity tracking – ownership – pipeline stages – follow-up – quotation status – basic reporting It addresses the core operational problem without requiring the business to redesign a large part of its technology environment.	Ease of use Strong The interface and operating model are comparatively straightforward. This matters because a customer-management system only becomes useful when employees consistently maintain: – status – ownership – next actions – customer information A theoretically powerful system with poor adoption would provide less value.
Change burden Good The business would need to introduce a new specialist system and establish working rules. However, the expected change is manageable relative to the benefit.	Capability depth Good The option does not provide the breadth of Solution B. For the current requirement, that is not a material disadvantage. The business primarily needs reliable execution of common customer-management activities.
Existing-tool fit Good The option should be validated against the existing email, calendar and document environment before commitment. No assumption should be made that every desired connection is available or commercially included.	Reporting Good The expected reporting capability is sufficient for the current management need: – open opportunities – owner – status – next action – basic pipeline information Advanced forecasting is not presently a priority.

Automation potential**Good**

There appears to be sufficient potential for useful routine automation without making automation itself the reason for selecting the system.

The business should first establish a reliable process.

Scalability**Good**

There is reasonable capacity for future growth.

It may not support every advanced future requirement, but the business should not optimise today's decision around hypothetical complexity that may never materialise.

Ongoing administration**Good**

The option is less likely than Solution B to require specialist internal administration.

This is important for an 18-person business.

Dependency**Manageable**

A dedicated customer-management system creates some dependency.

Before commitment, the business should verify:

- export options
- contract structure
- data extraction
- termination arrangements

MAIN RISK

The business may eventually outgrow the option if its processes become substantially more complex.

That risk should be weighed against the definite cost of introducing unnecessary complexity today.

RECOMMENDATION**→ RECOMMENDED**

Select Solution A, subject to final validation of commercial terms, workflow fit, data migration, integrations, permissions, export capability and supplier documentation.

Where practical, begin with a limited commitment rather than locking the business into a longer arrangement before fit has been demonstrated.



Solution B

Broader configurable platform

OVERALL ASSESSMENT

≡ DO NOT SELECT FOR THE CURRENT REQUIREMENT

Solution B is the most capable option.

It is not the recommended option.

Requirement fit

Strong

It can comfortably support the business's current requirements.

In several areas, it provides significantly more capability than required.

Ease of use

Adequate

The additional capability introduces:

- more configuration
- more choices
- more process decisions
- greater learning requirements

This does not mean the platform is inherently difficult.

It means the operating model is more demanding relative to the business's present needs.

Change burden

Weak

The option would likely require more work to:

- configure
- govern
- document
- maintain
- train users

The business would be adopting a broader operating model than necessary.

Capability depth

Strong

This is the option's clearest advantage.

It offers greater:

- workflow flexibility
- automation potential
- reporting
- customisation
- expansion capacity

The central question is whether those advantages are valuable enough now to justify the associated complexity.

The assessment concludes that they are not.

Existing-tool fit

Adequate

The option may support integrations with the existing environment, but integration capability alone does not eliminate:

- configuration
- administration
- change management

Reporting

Strong

Solution B offers the strongest reporting capability.

However, the business currently needs operational visibility rather than a sophisticated reporting environment.

Buying advanced reporting capability ahead of need would not by itself create value.

Automation potential**Strong**

The platform provides the strongest potential for complex automation.

Again, the business has not demonstrated a need for enough of that complexity to justify selecting the platform on this basis.

Ongoing administration**Weak**

This is a material concern.

A broader platform tends to create more internal decisions around:

- configuration
- fields
- permissions
- workflows
- reporting
- automation
- governance

For a business without a dedicated systems function, this burden matters.

Scalability**Strong**

The option offers the strongest future scalability.

However:

Future flexibility has value only when the probability and value of that future need justify paying for complexity today.

That case has not been demonstrated.

Dependency**Higher**

A heavily configured platform can become more difficult to leave because business processes increasingly depend on:

- custom fields
- workflows
- reporting structures
- platform-specific configurations

MAIN RISK

The business buys for a future level of complexity rather than its current operating requirement.

This can lead to:

- underused functionality
- unnecessary administration
- slower adoption
- increased switching difficulty

RECOMMENDATION

≡ DO NOT SELECT FOR THE CURRENT REQUIREMENT

Do not select Solution B for the current requirement.

Revisit a broader platform if the business later develops requirements that clearly exceed the capability of a simpler solution.



Solution C

Capability within existing software ecosystem

OVERALL ASSESSMENT

❗ DO NOT SELECT AS THE PRIMARY SOLUTION

Solution C offers the lowest change burden but leaves important requirements only partly solved.

Requirement fit The option can provide some: – contact management – task tracking – opportunity information – integration with existing work However, the customer-management experience is weaker than the dedicated options.	Adequate	Ease of use Employees already understand much of the surrounding software environment. That reduces learning burden.	Good
Change burden This is Solution C's clearest advantage. The business would minimise introduction of another independent platform.	Strong	Capability depth The option provides enough capability to improve on the current fragmented process. It does not provide as complete a solution to: – pipeline management – structured opportunity tracking – customer-management workflows – reporting	Adequate
Existing-tool fit This is the strongest option on ecosystem familiarity and proximity to existing tools.	Strong	Reporting Basic reporting is possible. It is less suited to the desired customer/opportunity-management visibility than the specialist alternatives.	Adequate

Automation potential**Adequate**

Some useful automation is possible.

The business may still need manual workarounds where specialist workflow capability is missing.

Scalability**Adequate**

The option may remain sufficient for relatively simple processes.

More specialised customer-management requirements could expose its limitations.

Ongoing administration**Good**

Administrative burden is likely manageable.

However, lower platform administration may be offset by greater manual process work.

Reversibility**Strong**

Because the business remains closer to its existing ecosystem, the decision creates less additional platform dependency.

MAIN RISK

The business chooses the least disruptive option rather than the option that actually solves the requirement.

This could preserve:

- fragmented processes
- inconsistent tracking
- limited visibility
- manual workarounds

RECOMMENDATION

● **DO NOT SELECT AS THE PRIMARY SOLUTION**

Do not select Solution C as the primary solution for this requirement.

It may remain useful for supporting activities within the existing environment, but the current customer-management problem justifies a more dedicated solution.

Key trade-offs

There is no option with maximum capability, minimum complexity, minimum dependency and zero change.

The decision depends on which trade-offs matter most.

A Solution A Simple specialist solution Best balance Enough capability without disproportionate complexity.	Solution A does not lead every category. Its strength is that it performs well across the categories that matter most now. PROVIDES - sufficient specialist capability - manageable adoption - acceptable future flexibility - reasonable administration TRADE-OFF - less advanced capability than Solution B That trade-off is appropriate for the current requirement.
B Solution B Broader configurable platform Most capable Greater capability in exchange for greater change, administration and dependency.	PROVIDES - the deepest capability - strongest reporting - strongest automation potential - greatest future flexibility TRADE-OFF - more configuration - more administration - more dependency - higher organisational burden The business would be accepting certain additional complexity today in exchange for capabilities it may need later. The current case for that trade-off is weak.
C Solution C Capability within existing software ecosystem Least disruptive Lower change in exchange for functional compromise.	PROVIDES - strongest alignment with the existing environment - low organisational disruption - good reversibility TRADE-OFF - functional compromise The business would reduce change partly by accepting that several current customer-management problems remain only partly solved. That is not the preferred balance.

Why not the most capable option?

— DECISION PRINCIPLE

The solution with the most capability is not necessarily the best solution.

Solution B performs strongly on:

- capability depth
- reporting
- automation potential
- scalability

Those are genuine advantages.

They do not make it the recommended option.

A system should not be selected because it could theoretically support every future process.

It should be selected because it provides a proportionate solution to a real requirement.

The business does not currently require enough of the additional capability to justify:

- greater configuration
- higher administration
- increased dependency
- more complex adoption

Buying significantly ahead of need can create:

- unused functionality
- unnecessary process complexity
- avoidable administrative burden
- stronger supplier dependency

The business can reconsider broader capability later if its requirements materially change.

Risks and dependencies

The recommendation is subject to practical verification.

Adoption risk

Even an appropriate solution will fail to provide useful management visibility if employees do not use it consistently.

The business needs simple working expectations around:

- ownership
- status
- next action
- customer information

Integration dependency

The business should confirm which integrations are:

- available
- included in the proposed licence
- appropriate to use

Do not select the solution on the basis of assumed integration capability.

Supplier dependency

Before commitment, verify the ability to:

- export information
- terminate the service
- retrieve business data
- understand what happens after termination

Migration risk

Existing information may be spread across:

- spreadsheets
- email
- documents
- individual records

The business should determine:

- what actually needs to migrate
- what can remain archived
- what needs cleanup

Do not migrate information simply because it exists.

Data access

Roles and permissions should be checked for:

- customer records
- commercial information
- management visibility
- administrator access

Process dependency

Technology cannot compensate for unclear internal rules.

The business still needs to define:

- ownership
- stages
- status
- follow-up expectations

Commercial considerations

The assessment does not assume that public list pricing reflects the final cost to this business.

Before contracting, confirm:

Licence model

- number of users required
- user types
- administrator licences
- minimum commitments

Contract term

Understand:

- minimum term
- renewal
- notice periods
- price changes
- termination

Migration

Determine whether migration assistance is:

- included
- separately charged
- performed by the supplier
- performed by another provider

Included functionality

Confirm whether required capabilities are included in the proposed package.

Do not assume a feature shown in marketing material is included in the relevant commercial tier.

Additional charges

Check for relevant charges related to:

- setup
- storage
- integrations
- additional functionality
- support
- usage

Support

Confirm:

- available support channel
- support entitlement
- whether higher support levels require additional payment

RECOMMENDATION

Do not allow an attractive headline price to determine the decision until the actual operating cost and commitment are understood.

Recommended decision

RECOMMENDATION

Select Solution A, subject to practical and commercial validation.

Solution A provides enough capability to materially improve:

- enquiry visibility
- customer information
- opportunity ownership
- quotation tracking
- follow-up
- pipeline visibility

It does so without requiring the business to adopt the additional complexity of Solution B.

Solution C remains attractive from a change-management perspective, but it does not address enough of the business requirement.

Decision rationale

The recommended option is not:

- the option with the most features
- the option requiring the least change
- the option designed for the most complex future scenario

It is the option with the strongest overall fit to the requirement the business actually has.

Recommended commitment approach

Where commercially practical:

- avoid unnecessary long-term commitment at the outset
- validate with a limited user group or practical trial
- confirm important workflows
- verify integration assumptions
- test actual usability
- confirm migration requirements
- verify data export before wider adoption

The objective is to prove fit before increasing dependency.

What to confirm before committing

Before signing an agreement, confirm the following.

Commercial

- ☐ final price
- ☐ billing structure
- ☐ licence count
- ☐ contract term
- ☐ renewal
- ☐ notice requirements
- ☐ additional charges

Workflow

Walk through real examples:

- 1 new enquiry
- 2 assignment
- 3 qualification
- 4 quotation
- 5 follow-up
- 6 closure

Do not validate solely through a generic product demonstration.

Migration

- ☐ source information
- ☐ volume
- ☐ cleanup
- ☐ mapping
- ☐ responsibility
- ☐ cost

Exit

- ☐ export format
- ☐ accessibility of exported information
- ☐ termination process
- ☐ retention/deletion arrangements
- ☐ any practical barriers to moving away

Functional

- ☐ customer/contact records
- ☐ opportunity stages
- ☐ ownership
- ☐ quotation status
- ☐ follow-up
- ☐ reporting
- ☐ search
- ☐ required automation

Integration

Confirm required interaction with:

- ☐ email
- ☐ calendar
- ☐ document tools
- ☐ other important business systems

Access and security

Review:

- ☐ authentication
- ☐ access controls
- ☐ administrator roles
- ☐ supplier security documentation
- ☐ relevant privacy/data-processing information

Support

- ☐ support availability
- ☐ support route
- ☐ expected service level where relevant
- ☐ whether adequate support is included

Assessment method

ActiveHub evaluates solutions in the context of the business requirement rather than comparing products solely on feature quantity.

The assessment asks:

What problem needs to be solved?

Is the requirement clear enough to evaluate solutions meaningfully?

Which capabilities actually matter?

Which functions are necessary now?

Which are merely attractive?

How will people use the solution?

Is the proposed operating model realistic for the business?

What change is required?

Does the expected benefit justify the organisational disruption?

What does the solution add?

Does additional capability solve a likely requirement or simply increase complexity?

What ongoing burden does it create?

Who will administer, maintain, govern and support the system internally?

What dependency is created?

How difficult would it be to change direction later?

What must be verified?

Which assumptions depend on supplier confirmation, contract review, trial, demonstration or technical validation?

What is proportionate?

Does the overall solution fit the size, capability, requirements and resources of the business?

ASSESSMENT PRINCIPLE

Choose the solution that best fits the requirement you actually have—not the one with the longest feature list.

A solution can be more capable and still be the wrong choice.

A solution can require less change and still leave too much of the problem unsolved.

The purpose of supplier evaluation is to identify the option with the most appropriate trade-offs for the business.

FINAL RECOMMENDATION

Recommendation: Solution A.

Validate the remaining commercial and operational assumptions before committing, and avoid unnecessary long-term dependency until the fit is proven.