



# BUYER'S GUIDE FOR PURCHASING APPLICATION MANAGEMENT SOFTWARE

# CONTENTS

Introduction	3
Ease of Use	4
Flexibility	5
Security & Accessibility	6
Data Storage	7
Support & IT	8
Automation Features	9
Collaboration & Review Tools	10
Network & Shareability	11
An Application Software Solution	12
Cheat Sheet	13-14

# Whether you're accepting digital applications for contests, publishing, grants, or another purpose, organization is crucial.

Today's applicants have high expectations when it comes to the online application process. If they can't get their information to you quickly and easily, they may not complete their application at all. It's easy to see the value in quality application software, but making that final product choice can be difficult.

Understanding the key aspects of quality software will help you evaluate options carefully. This document outlines important points to consider when researching application management software, and suggests questions to ask when vetting potential solutions. Check out the cheat sheet at the end for an all-in-one, easy-to-print checklist of those questions. And go into your next meeting confident you're asking the right questions and making an informed choice.

## EASE OF USE

If your applicants are faced with outdated processes where they need to download, print, complete, and then scan and email or mail forms and application materials, they may postpone submitting or, even worse, rethink their decision.

With application management software, you can quickly create modern, on-brand forms that pre-screen applicants and collect exactly the information you need. Use required fields and survey or branching tools to reduce incomplete or unsuitable applications.

Associating your organization or business with intuitive, modern technology attracts professional, high-quality applicants who appreciate the convenience of a digital interface. It can also make your opportunity more widely accessible, increasing the diversity of applications and making the process more equitable.



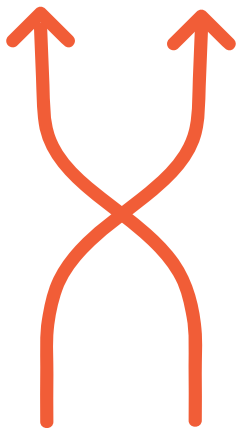
### ASK ABOUT

- 1** Will I need an experienced developer or outside resource to create and edit application forms with this software? Can I do it myself?
- 2** How long will it take to begin receiving applications?
- 3** What's the process for creating, editing, publishing, and sharing finished application forms?

# FLEXIBILITY

Whether you're creating one application process or several, you need a software solution that gives you ample flexibility to insert custom fields that are well-suited to your needs. If you're confined to text fields, you may not be able to gather all the details that you need.

The best application software solutions will let you collect a wide variety of files via upload, including videos, images, and audio. Conditional logic forms will super-power your process by customizing the application based on the individual's response to previous questions. A combination of text fields, tables, check boxes, radio lists, and other fields will help you get the details you need in a way that makes sense.



## ASK ABOUT

- 1 Does this software accept a wide variety of file types?
- 2 What are the options for form fields?
- 3 Can I brand my form with my logo and brand colors?

## SECURITY & ACCESSIBILITY

Your application software is responsible for storing valuable information on each applicant. In today's potentially dangerous digital age, it's crucial your software keep this information secure. If people have reason to believe your application process is unsafe, you could lose the attention of many outstanding applicants and risk hurting your brand's reputation.

While it's important that a software keep the bad out, it's equally important that it let all the right people in. Be sure to ask about accessibility: The platform should be accessible to a wide range of applicants, including those with disabilities.



### ASK ABOUT

- 1** What safeguards are in place to keep application information safe?
- 2** Who can access applications?
- 3** Is the software compliant with important security benchmarks like GDPR, SOC2, and HIPAA?
- 4** Is the platform accessible for users with disabilities?
- 5** Has a third party assessed the software and issued a Voluntary Product Accessibility Template (VPAT)?

## DATA STORAGE

How are you currently storing your applications? If you're paying for data storage, upgrading to an application management software that offers storage can be a cost saver. If you're accepting paper applications, moving online makes your operations more sustainable, saves space, and keeps information in a format that's neat, organized, and easily searchable. A product that relies on cloud storage is typically the best option for security, shareability, and ease of use.



### ASK ABOUT

- 1** Does this software provide file storage?
- 2** Are there limits on how big of file sizes you can store or for how long?
- 3** Are there extra charges for file storage?
- 4** Are the files easy to search and reference later?

## SUPPORT & IT

Before you purchase a software solution, reach out to the company's technical support team to see how easy they are to connect with. If you can't get someone on the phone now, you may have trouble doing so in the future, when you're facing a time-sensitive issue with your process. You want to choose a product that offers robust support solutions, so you're not left scrambling if you can't figure something out. A software should also offer automatic updates—no IT needs on your end—without disrupting your service.



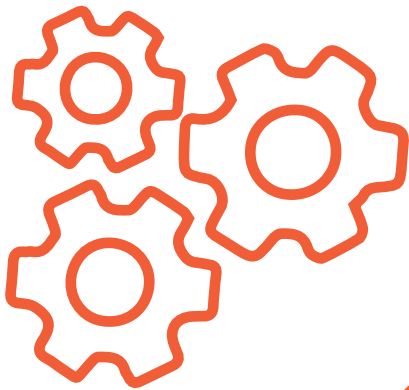
### ASK ABOUT

- 1** How and when can I reach the tech support team?
- 2** Do you offer onboarding to help train new users?
- 3** Is there an online help center for frequently asked questions?
- 4** What is the process for software updates? Will I see a disruption in service?



## AUTOMATION FEATURES

Automation is a great time-saver when you're setting up, reviewing, and managing applications. Look for software that will help you automate routine tasks, like sending a response to applicants, sorting and labeling applications, or moving an application through the review process. Take a walk through the entire process of creating a new application with your top contenders. Which product allows you the most flexibility in the fewest steps?



### ASK ABOUT

- 1** What automation tools are available?
- 2** Will they save me and my team time in our process?
- 3** Can I make bulk updates?
- 4** What tools are in place to help me communicate with the applicants themselves?

## COLLABORATION & REVIEW TOOLS

Though you may have a key point of contact for your application review process, it can be helpful to get insights from others on your team or even outside your organization. The best application software will let you share content easily across multiple users, so you can get review input from members of your team, managers, and even independent reviewers, guest judges, or board members before you make your final decision.



### ASK ABOUT

- 1** How can I share applications with other members of my internal team?
- 2** Who has access to applications to participate in the review process?
- 3** How is feedback collected and shared?
- 4** Can I choose what information is visible to each reviewer to protect the applicant's privacy?

## NETWORK & SHAREABILITY

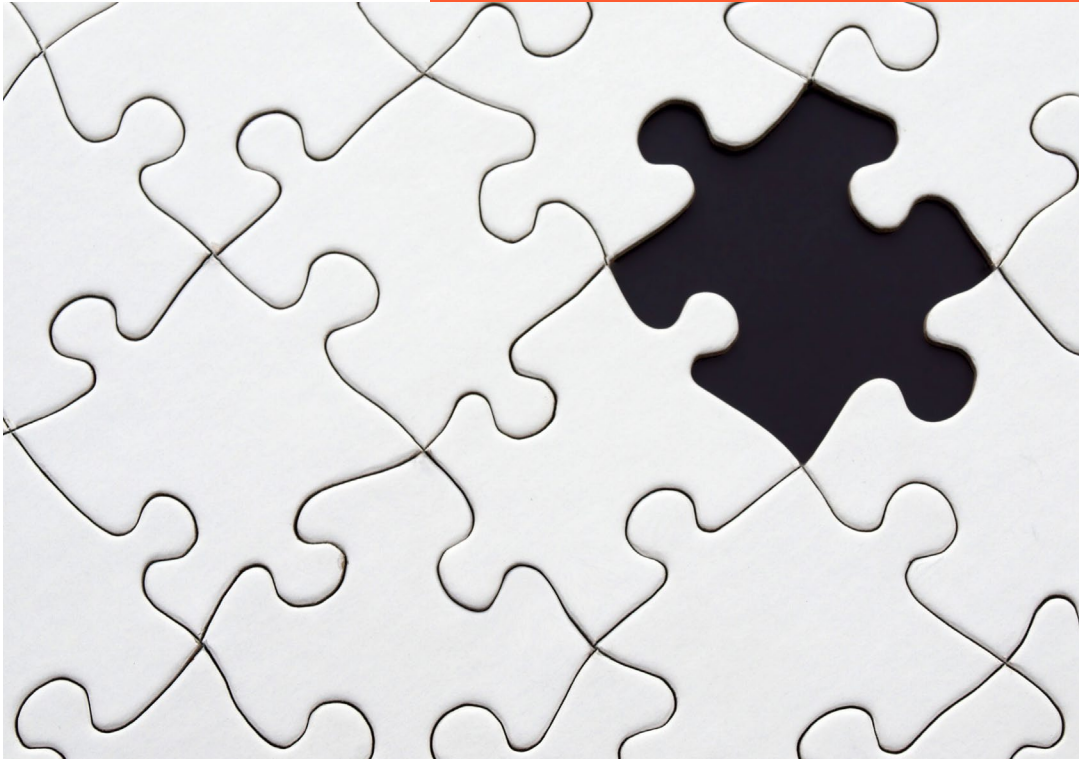
Even the most organized application process won't reach the right audience if you can't share it efficiently. How do you manage your applications? Is the application hosted on your website? Do you have a social sharing strategy? If you're not actively soliciting applications in the right places, you may not get the quantity or quality that you're looking for.

However you market your applications, make sure you're choosing a software solution that will streamline the process for you. The easier it is to spread the word, the better your success will be with applications.



### ASK ABOUT

- 1 Do you offer promotional or marketing services to support our opportunity?
- 2 What can I do to get more and/or better applications?



## **AN APPLICATION SOFTWARE SOLUTION**

When you have the right tools in place, you can manage applications for multiple projects with ease. A powerful application management software helps you set up sleek online forms, organize your incoming applications, and collaborate with your team as you consider each applicant. Take the time to evaluate your options so you can find a product that meets all your team's needs.

# Cheat Sheet

Application management software can go a long way toward simplifying your application and review process. Before you buy, though, be sure to go through this checklist of important questions to help you evaluate your options and make the right choice.

## EASE OF USE

Will I need an experienced developer or outside resource to create and edit application forms with this software?  
Can I do it myself?  
How long will it take to begin receiving applications?  
What's the process for creating, editing, publishing, and sharing finished forms?

## FLEXIBILITY

Does this software accept a wide variety of file types?  
What are the options for form fields?  
Can I brand my form with my logo and brand colors?

## SECURITY & ACCESSIBILITY

What safeguards are in place to keep application information safe?  
Who can access applications?  
Is the software compliant with important security benchmarks like GDPR, SOC2, and HIPAA?  
Is the platform accessible for users with disabilities? Has a third party assessed the software and issued a Voluntary Product Accessibility Template (VPAT)?

## **DATA STORAGE**

- Does this software provide file storage?
- Are there extra charges for file storage?
- Are there limits on how big of file sizes you can store or for how long?
- Are the files easy to search and reference later?

## **SUPPORT & IT**

- How and when can I reach the tech support team?
- Do you offer onboarding to help train new users?
- Is there an online help center for frequently asked questions?
- What is the process for software updates? Will I see a disruption in service?

## **AUTOMATION FEATURES**

- What automation tools are available?
- Will they save me and my team time in our process?
- Can I make bulk updates?
- What tools are in place to help me communicate with the applicants themselves?

## **COMMUNICATION & COLLABORATION TOOLS**

- How can I share applications with other members of my internal team?
- Who has access to applications to participate in the review process?
- Can I choose what information is visible to each reviewer to protect the applicant's privacy?
- How is feedback collected and shared?

## **NETWORK & SHAREABILITY**

- Do you offer promotional or marketing services to support our opportunity?
- What can I do to get more and/or better applications?

# Submittable

[submittable.com](https://submittable.com) | (855) 467-8264

---

Submittable is the leading application management software, used by thousands of organizations to streamline their application and review process and grow their mission.