

# 2024 SMB BUYING JOURNEY SURVEY

August 2024

Sponsored by:

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 **SMB Group**  
Actionable Market Insight

# Table of Contents

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*The 2024 SMB Technology Buying Journey Survey provides a detailed look at the purchasing behaviors and preferences of small and medium businesses (SMBs) regarding technology. Survey findings will help vendors to better align their sales and marketing strategies with SMB needs and expectations.*

## **Methodology**

## **Executive Summary**

## **Detailed Findings:**

1. Business Background and Trends
2. Technology Background and Trends
3. Key Factors in Technology Purchase Decisions
4. Information and Guidance Sources for Technology Solutions
5. Software Purchase Criteria and Channels
6. PC, Laptop, and Tablet Purchase Criteria and Channels
7. Technology Infrastructure Purchase Criteria and Channels
8. Post-purchase Communication and Service Preferences
9. Methods and Metrics to Gauge Success
10. Demographics

*Data is segmented by employee size and industry; additional segmentation is available upon request*

# Study Focus and Methodology

## Methodology:

### Data collected in June, 2024

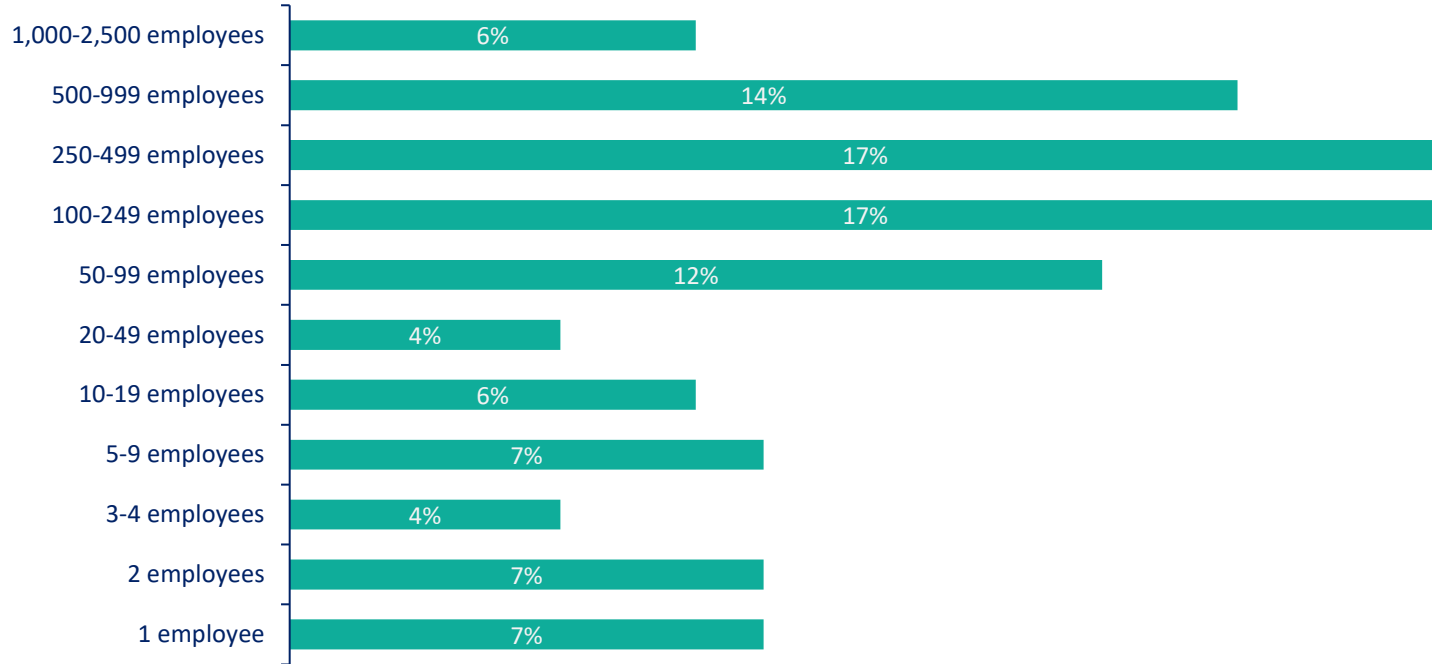
- 738 completed interviews
- Web-based survey
- Random sample of U.S. SMBs
- Respondents are finance and related technology solutions decision-makers/influencers
- 57 questions

## Sample and Segmentation:

- 9 employee size bands split between businesses with 3 – 2,500 employees\*
  - Small: 1-4, 5-9, 10-19, 20-49, 50-99
  - Medium: 100-249, 250-499, 500-999
  - Midmarket: 1,000-2,500\*
- Segmentation by industry (as sample size permits)
- Additional segmentation available upon request

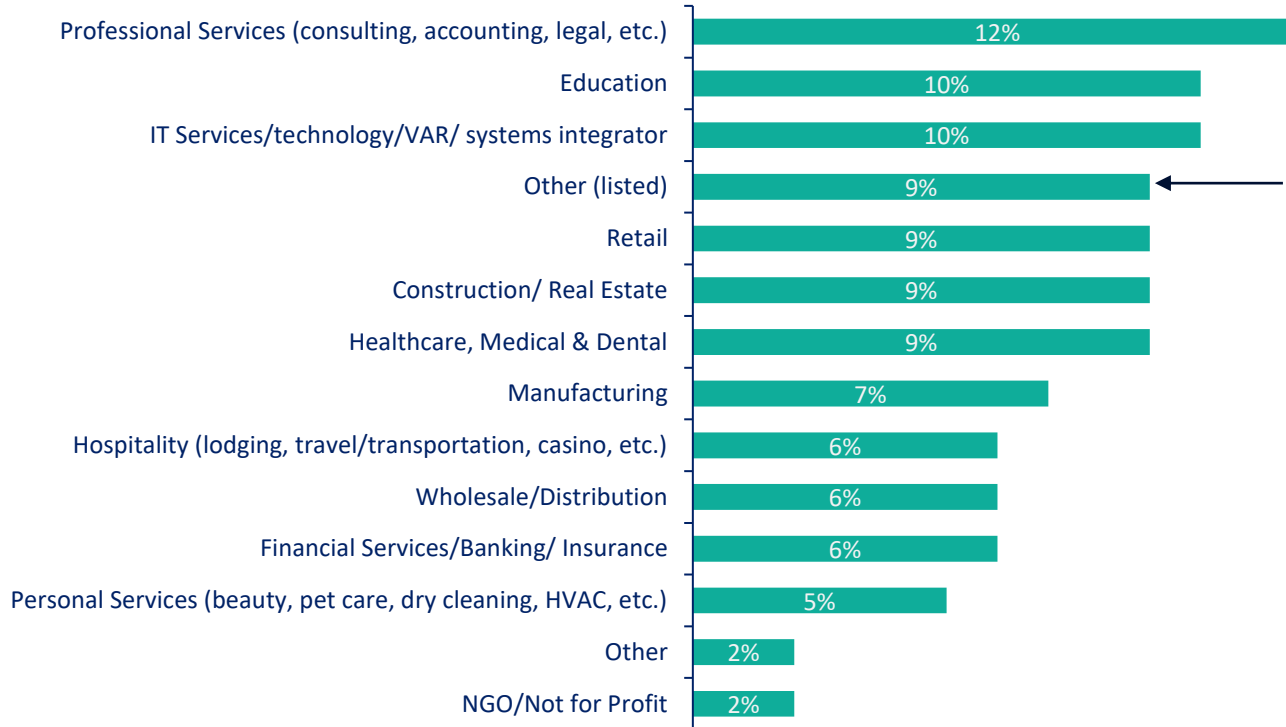
*\*For brevity, we refer to the entire 1-2,500 group as SMB throughout this report.*

# Employee Size Distribution



3) How many full-time employees, including yourself, work in your organization (not including external contractors)?, Sample Size = 738

# Industry Distribution



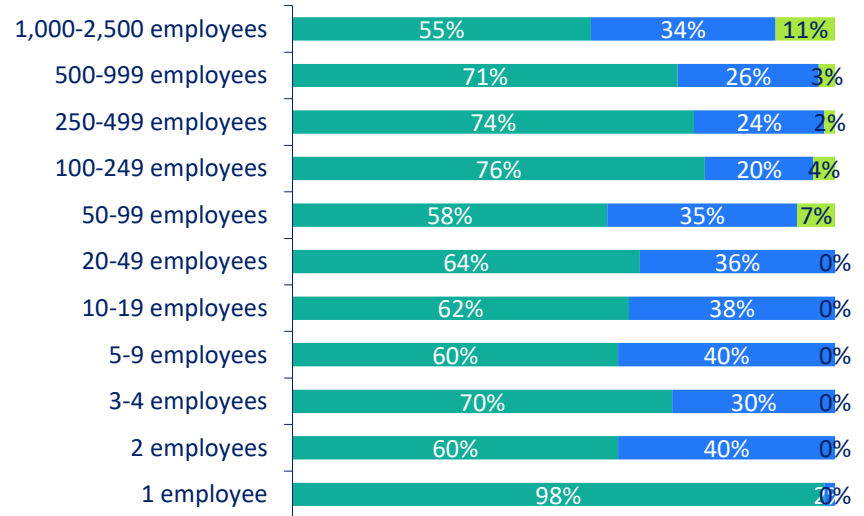
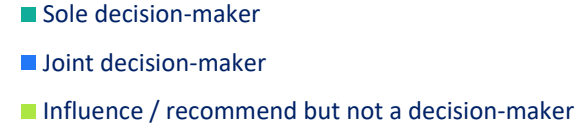
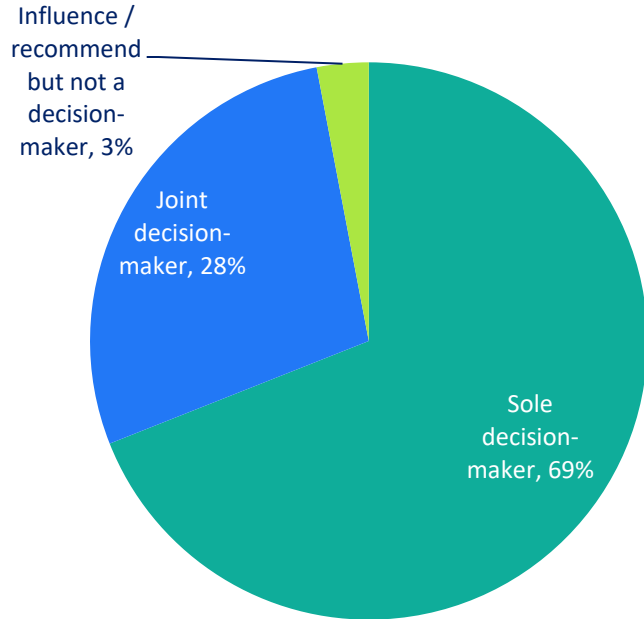
*Note: Sample sizes were low for some industries specifically listed on the survey. These are grouped together in “Other (listed)”:*

**Total respondents for “Other (listed): 63**

- Utilities/Communications/Telecom: 7
- Mining: 4
- Agriculture: 13
- Independent Software Vendor (ISV)/Developer: 8
- Government (federal and state): 13
- Life Science: 6
- Media: 12

4) Which of the following best describes the industry in which your organization operates?, Sample Size = 738

# Respondents' Level of Decision-Making for Purchasing Technology Solutions



1) Which of the following best describes your decision-making level for selecting and/or purchasing technology solutions for your organization?, Sample Size = 738

# Executive Summary



# Business Background and Trends

## Revenue Outlook

- **SMBs are optimistic about growth: 62% of SMBs project 2024 revenues will rise vs. 2023**
- A majority of SMBs with 10-2,500 employees expect revenues to increase
- SMBs with 10 employees or less are more likely to expect revenues to remain flat
- Most optimistic industries: Financial Services/Banking/Insurance, Wholesale/Distribution, IT Services/Technology
- **Tailor messaging to highlight how tech solutions can support growth; focus on cost-effectiveness for SMBs with less than 10 employees; develop targeted industry strategies**

## Top Macro Challenges

- **Inflation and recession dominate concerns: Inflation (65%); recession (41%); and supply chain interruptions (34%) are the top 3 challenges; and are fairly consistent across employee size bands and industries**
- Cybersecurity is #4 (32%)
- SMBs with 50+ employees and respondents in IT Services/Technology are most likely to rank cybersecurity as a top three challenge, while SMBs with less than 50 employees are least likely to
- **Position solutions to mitigate the impact of inflation and supply chain issues, e.g., cost efficiencies or enhanced supply chain visibility**
- **Tailored cybersecurity solutions for some industries**

## Top Operational Challenges

- **Operational challenges vary markedly by employee size:** SMBs with fewer than 50 employees are most likely to put attracting new customers, controlling costs, and improving cash flow at the top of the list
- Key variations: Those with 50+ employees are more likely to cite keeping up with changing customer demand, meeting hiring goals, and improving customer satisfaction as top challenges
- Top challenges also vary considerably by industry
- **Highlight how solutions enhance customer acquisition and financial management for smaller SMBs; focus on how they help manage customer expectations, recruiting, and improve service quality for larger ones**

# Technology Background and Trends

## Top Tech Benefits

- **Top 3 benefits: Productivity gains (35%); improved collaboration/communication (34%); and cost-savings (31%);** followed by better relationships with customers (30%); time-savings (30%)
- There are relatively minor variations by employee size bands and industry
- **Emphasize how solutions deliver tangible improvements in these areas and how they facilitate better customer engagement and streamline processes; provide clear, quantifiable examples and case studies to illustrate these benefits, with industry-specific scenarios.**

## Top 3 Challenges When Considering New Technology Solutions

- **Top 3 challenges: Data privacy and security (47%); difficulty figuring out which solutions will work best (45%); and integration (44%),** followed by lack of budget (32%); takes too long to get productive (28%); and not enough time to try/deploy new solutions (25%)
- SMBs with less than 20 employees are most likely to cite difficulty figuring out which solutions will work best as a top challenge
- Companies with less than 10 employees rank lack of budget as a top challenge
- SMBs with 50+ employees are more to cite data privacy and security and integration as top challenges
- **Provide clear guidance on how to choose the right solution; offer personalized consultations and trials to help SMBs make decisions**
- **Communicate security capabilities and compliance with data protection regulations; offer detailed information about data safeguards and management**
- **Highlight ease of integration and offer integration support and case studies or examples of successful integrations**
- **Offer flexible pricing models/pay-as-you-go pricing for smaller businesses**

# Technology Background and Trends

## Technology Budgeting Methods

- **1/3 of SMBs determine budgets based on prior spending with adjustments, followed by alignment with specific requirements (25%); profitability (18%); ad hoc basis (16%); employee headcount (7%)**
- As employee size decreases, SMBs are increasingly likely to budget on an ad hoc basis
- Tailor proposals to meet specific needs; show how solutions can be adapted to meet unique demands
- **Provide easy-to-implement solutions that require minimal upfront commitment for ad hoc budgeters with modular options they can add incrementally**

## Technology Spending Change (next fiscal year)

- **55% of SMBs say they will increase spending; 36% expect spending to remain flat; 4% say it will decrease**
- As employee size grows, the more likely SMBs are to expect spending to rise
- Industries most likely to increase spending: Financial Services/Banking/Insurance, Manufacturing, IT Services/Technology
- Least likely: Personal Services, Hospitality, NGO/Not for Profit
- **Target larger SMBs and industries with plans to spend more evidence of how solutions can drive business expansion and efficiency improvements**
- **Emphasize cost-effectiveness and value-for-money for those with budget constraints**

## Ways SMBs Finance Tech Purchases

- **SMBs use multiple methods to finance tech purchases: 58% use company-allocated funds; 40% use company credit cards; 25% use special project funding/grants; 23% lease/finance; 17% use personal credit cards**
- As companies grow, financing methods become more diverse
- Personal credit cards are the most frequently used option for SMBs with 1 to 2 employees
- **Provide diverse payment options with clear payment terms; offer flexible payment plans and discounts for upfront payments; provide information/guidance to help SMBs secure special funding/grants**

# Technology Background and Trends

## IT Support, Management, and Implementation Resources

- **60% of SMBs have FT salaried IT staff; 22% use MSPs; 16% use external consultants, 15% have no formal support; 12% use PT salaried employees, and 9% use non-IT staff**
- **81% of SMBs with 50+ employees have FT IT staff; in businesses with less than 50 employees, 21% have FT IT staff; 42% have no formal IT support**
- **IT Services/Technology, Manufacturing, and NGO/Not for Profit are most likely to have FT IT staff**
- **Personal Services, Professional Services, Construction/RE are least likely to have FT IT staff**
- **Tailor services/package to support customers with varying levels of IT resources**
- **Emphasize user-friendly features For those with limited IT support**

## Budget for new Vs. Existing Solutions

- **Two-thirds of annual SMB IT budgets support existing solutions; 34% is allocated to implement new solutions**
- **Spending allocations for new solutions rise slightly as SMBs grow**
- **SMBs with 1-2 employees who only spend about one-quarter of their budget on new solutions**
- **Emphasize how new solutions can integrate with/enhance existing systems; highlight ROI and potential cost savings and potential for growth and scalability**

## How Often SMBs Reevaluate their tech stack

- **41% of SMBs reevaluate yearly; 22% on an as-needed basis; 17% more than once a year**
- **SMBs with less than 50 employees are most likely to reevaluate on an ad hoc basis, while those with 50+ are most likely to reevaluate yearly**
- **Industries most likely to reevaluate more than once/year: Financial Services/Banking/Insurance, IT Services/Technology, Wholesale/Distribution**
- **Least likely: Retail, Professional Services, Construction/RE**
- **Time outreach strategies to align with reevaluation periods**

# Key Factors in Technology Purchase Decisions

## Importance of Tech to Business Strategy

- **Technology is key to SMB business strategy: 65% of SMBs view tech as very important; 28% say it is somewhat important to overall business strategy; the importance increases with company size**
- Industries most likely to rank it as very important: Wholesale/Distribution, IT Services/Technology, NGO/Not for Profit, Professional Services
- Least likely; Personal services, Healthcare, Medical & Dental, Retail
- **Position products as essential tools to achieve broader business; demonstrate their strategic benefits**

## Role of Macro-economic Factors in Technology Investments

- **Macro-economic factors heavily influence tech investments: 83% say that macro-economic factors influence tech investment timing and decisions: very decisively (21%); significantly (35%); and moderately (27%)**
- Macro-economic factors influence larger SMBS more than smaller ones
- Industries most likely to cite macro-economic factors having a very decisive or significant influence: Manufacturing, Financial Services/Banking/Insurance, IT Services/Technology
- Least likely: Personal services (36%), Professional Services (37%); Construction /RE (36%)
- **Stay informed about trends and address how solutions can help SMBs navigate macro-economic challenges, e.g. by enhancing resilience and adaptability**

## Impact of AI on Tech Investments

- **AI is accelerating SMB investments: Significantly accelerating (27%) somewhat (31%) slightly (35%), and correlates markedly with employee size**
- Industries most likely to accelerate significantly: Manufacturing (47%), Financial Services/Banking/Insurance (45%), IT Services/Technology (42%)
- Least likely: Personal services (13%), Education (17%); Hospitality (19%)
- **For larger SMBs and accelerating industries, emphasize how solutions use AI to drive innovation and growth, highlighting advanced AI features and benefits**
- **For smaller SMBs and laggard industries, emphasize the practical and incremental benefits of AI**

# Key Factors in Technology Purchase Decisions

## Top Reasons Solutions Get on a “Short List”

- **Top 3 factors: Most cost-effective (43%); better compatibility with existing systems (34%); easier to use (33%),** followed by superior tech and features (31%); easier to customize (24%); and easier/faster to deploy (24%)
- The smaller the SMB, the more likely they are to rate easier to use and more cost-effective in the top 3
- The larger the SMB, the more likely they are to rank better compatibility with existing systems in the top 3
- The top 3 rankings are fairly similar across industries, although the order varies somewhat
- **Provide clear cost-benefit analyses and how solutions can deliver financial savings; demonstrate how solutions integrate with other systems;**
- **Highlight minimal training requirements and technological advancements and benefits that provide differentiation**

## Top Ways Vendors Can Improve the Purchasing Experience

- **Top 3 ways: Better explain how the solution helps improve business/tech goals ((56%); provide more transparent pricing info on their site (46%); take more time to understand our requirements (44%),** followed by a consistent experience across channels (39%); better access to phone support (31%) and better real-time chat support (29%)
- The top 3 rankings are fairly similar across employee size bands and industries, although the order varies somewhat
- **Employ a consultative, responsive approach to demonstrate an understanding of SMBs’ requirements and illuminate how solutions help them with their goals**
- **Provide clear and readily available pricing information and tailed pricing options, including discounts or promotions; and avoid hidden fees**

# Information and Guidance Sources for Technology

## Decisions

### Information Sources for Learning About New Solutions

- **Top 3 info sources: Web search (54%); vendor application marketplaces (39%); and vendor websites (36%);** followed by business and tech publications (32%); tech analyst sites (29%); and social media sites (24%)
- The top three are mostly consistent across employee size and industry segments
- **Enhance SEO strategies and investments to elevate web search rankings**
- **Increase active participation in complementary application marketplaces**
- **Ensure your website is informative and user-friendly; use such as live demos, and virtual tours**

### Content Preferences for Learning About Technology Solutions

- **Top 3 content preferences: Reviews in industry publications (35%); customer testimonials (29%); peer reviews (27%);** followed by virtual events (26%); KPI studies (26%) and GenAI platforms (25%)
- SMBs with fewer than 50 employees are more likely to rank customer testimonials in the top 3, compared to those with 50+ employees
- SMBs with fewer than 50 employees are more likely to rank KPI studies in the top 3, compared to those with 50+ employees
- Content preferences also vary by industry
- **Enhance PR outreach and paid partnership to garner exposure in with publications to boost awareness and credibility**
- **Build a robust collection of customer testimonials; embed these in sales and marketing campaigns**
- **Maximize creativity and frequency of interactive events**
- **Customize assets for different SMBs segments**

# Information and Guidance Sources

## Paid Analyst Subscription Services

- **The vast majority of SMBs do not pay for analyst services: 13% of SMBs say they pay for analyst subscription services; almost all of these are SMBs with 50+ employees**
- When asked what analyst firms they have paid subscriptions for, **only 13 of 80 respondents listed an actual IT analyst firm** (the rest listed vendors, business advisors, consultants, etc.)
- Top industries for paid analyst services: IT Services/Technology (29%); Manufacturing (20%); Hospitality (14%)
- **Consider alternative ways to augment credibility: e.g. consultants, experts, influencers, industry orgs, etc., and sponsoring analyst research that you offer at no charge to SMBs**

## Guidance Sources for Evaluating New Technology

- **Top 3 guidance sources: Tech-consultants (44%), business advisors (40%); and advisers from software vendors they work with (38%),** followed by advisors from hardware vendors they work with (32%); industry organizations (31%); and employees (28%)
- This is fairly consistent across employee size bands
- SMBs with less than 50 employees are more likely to rely on friends and family than those with 50+ employees
- SMBs with 50+ employees are more likely to rely on investors compared to those with fewer than 50 employees
- **Strengthen partner relationships, enablement resources and support services**

## Research, Evaluation, and Selection Process Prior to Contacting Vendors

- **1/3 of SMBs complete 25%-49% of the process prior to contacting vendors; 1/3 complete 50%-75%; 17% complete more than 75%; and 13% complete less than 25%**
- SMBs with less than 50 employees are more likely to complete more than 75% of the process than larger ones
- **Ensure websites, marketing, and social networks are easily accessible, consistent, and clear to support the decision-making process**
- **Provide opportunities for live consultations and Q&A sessions to address specific concerns and questions SMBs might have during the evaluation process**
- **Tailor approaches by employee size;**



# Software Purchase Criteria and Channels

## Purchase Criteria

- **Rankings for “very important” criteria: Industry-specific functionality (45%); pre-built integrations (36%); fully-enabled mobile interface (35%); incorporated AI capabilities (29%); available in the SaaS model (28%)**
- The top 3 criteria are fairly consistent across size and industry
- As employee size grows, SMBs rate substantially more criteria as very or somewhat important
- Industries rating the most criteria as very important: Manufacturing; Wholesale/Distribution; and Financial Services/Banking/Insurance
- Industries rating the fewest criteria as very important: NGO/Not for Profit; Professional Services; Hospitality
- Highlight in-demand capabilities and benefits
- **For smaller SMBs: Focus on simplicity, ease of use, and cost-effectiveness**
- **For larger SMBs: Emphasize scalability, comprehensive feature sets, and integration capabilities**

## Purchase Channels

- **Top 3 channels: Direct from SW site (50%); direct for SW sales rep (47%); application marketplace (33%);** followed by third-party retailer/retailer (32%) third-party VAR/MSP (32%); distributor (30%); local computer stores (16%)
- The top 3 channels are fairly consistent across size and industry
- Smaller SMBs are more likely to buy from local computer stores
- Larger SMBs are more likely to buy from distributors than smaller ones
- **For smaller SMBs: Provide detailed product information and support on your website, via your sales team, and through local channels**
- **For larger SMBs: Invest more in training for distributors and direct sales representatives to cater to more complex needs.**

# PC, Laptop, and Tablet Purchase Criteria and Channels

## Purchase Criteria

- **Rankings for “very important” purchase criteria: Financing (33%); HWaaS (31%); Leasing (22%); Refurbished (12%)**
- The top 3 criteria are fairly consistent across size and industry
- As employee size grows, SMBs rate substantially more criteria as very or somewhat important
- Industries rating the most criteria as very important: IT Services/Technology; Manufacturing, and Retail
- Industries rating the fewest criteria as very important: Professional Services, Hospitality, NGO/Not for Profit
- **Prominently feature financing options in sales and web presence**
- **Feature HWaaS options alongside purchase options**
- **Tailor proposals to address specific customer needs**

## Purchase Channels

- **Top 3 purchase channels: Direct from manufacturer’s sales rep site (51%); direct from manufacturer’s website (51%); third party retailer/etailer (46%);** followed by third-party VAR/MSP (33%); distributor (27%); local computer stores (25%)
- The top 3 channels are fairly consistent across size and industry
- Smaller SMBs are more likely to buy from local computer stores
- Larger SMBs are more likely to buy from distributors than smaller ones
- **Strengthen direct sales rep capabilities and optimize your website**
- **Enhance tools, training, and information for third-party sellers**
- **Collaborate with MSPs, VARs, and distributors to offer integrated/tailored solutions**
- **Provide a consistent purchase experience across channels, as most SMBs are multi-channel shoppers**

# Technology Infrastructure Purchase Criteria and Channels

## Purchase Criteria

- **Rankings for “very important” purchase criteria: Private cloud (39%); financing (32%), public cloud (29%); HWaaS (28%); leasing (22%); refurbished (14%)**
- The top 3 criteria are fairly consistent across size and industry
- As employee size grows, SMBs rate substantially more criteria as very or somewhat important
- Industries rating the most criteria as very important: Manufacturing; Financial Services/Banking/Insurance; and Wholesale/Distribution
- Industries rating the fewest criteria as very important: Professional Services; Construction/RE; and Hospitality
- **Provide both public and private cloud options when possible**
- **Prominently feature financing options in sales and web presence**
- **Emphasize hardware as a service (HWaaS) and leasing options**

## Purchase Channels

- **Top 3 purchase channels: Direct from manufacturer’s sales rep site (50%); direct from manufacturer’s website (50%); third party retailer/etailer (35%);** followed by third-party VAR/MSP (34%); distributor (33%); local computer stores (19%)
- The top 3 channels are fairly consistent across size and industry
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- **Strengthen direct sales rep capabilities and optimize your website**
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- **Collaborate with MSPs, VARs, and distributors to offer integrated/tailored solutions**
- **Provide a consistent purchase experience across channels, as most SMBs are multi-channel shoppers**

# Post-Purchase Communication and Service Preferences

## Preferences for Ongoing Vendor Communications

- **Top 3 communication preferences: Customer portals (54%); email newsletters (48%); and community forums (37%),** followed by webinars/live streams (33%); SMS/messaging apps (31%); push notifications (27%); and social media (27%)
- SMBs with less than 100 employees rate email newsletters as their #1 choice; while for SMBs with 100+ employees, email newsletters mainly disappear from the top 3
- Top preferences are fairly similar across industries
- Strengthen communications/outreach via customer portals with proactive messaging/push notifications; tailor email newsletters to smaller SMBs

## Preferences for Engaging with Vendors to Resolve Service Issues

- **SMBs prefer live support: Top 3 service resolution preferences: phone (51%); live chat (46%); help desks/ticket systems (40%); onsite (34%);** followed by remote desktop (34%); support in the application (33%); knowledge bases/FAQs (21%); community forums (14%)
- SMBs with less than 20 employees rate phone support as their #1 choice, while larger SMBs are more likely to rate live chat, onsite support, and help desks/ticketing systems as their top preference
- Top preferences are fairly similar across industries
- **Augment phone and chat support with AI-assisted help for common issues so agents have more time to help with complex issues**

## Ways Vendors Can Better Support SMBs Post-Implementation

- **Top 3 ways vendors can better support implementation: Easier access to customer support (52%); dedicated account manager (51%); better training/resources (46%),** followed by more proactive security monitoring (45%); regular check-ins/feedback sessions (44%); better upgrade options (34%)
- SMBs with less than 20 employees rate easier access to support as the #1 way, while larger SMBs are most likely to rate dedicated support manager as their #1 pick
- Top preferences are fairly similar across industries
- **Streamline support services to speed responses to customer requests; offer dedicated support options**

# Methods and Metrics to Gauge Success

## Methods to Assess the Success of Tech Solutions

- **Top 3 methods: Formal measurement programs (49%); review meetings (40%); internal audits (37%),** followed by informal user feedback (36%); user adoption/utilization (32%); structured user feedback programs (32%); and benchmarking against industry standards (31%)
- SMBs with less than 20 employees rate informal user feedback as their #1 method; while SMBs with 20+ employees rank formal measurement programs as their top method
- Healthcare/Medical/Dental; Education, and Financial Services/Banking/Insurance are most likely to use formal methods, while Retail, Wholesale/Distribution, and Construction/RE are most likely to use informal methods
- **Build measurement programs/capabilities and status check planning into the implementation process to ensure alignment and improve outcomes**

## Metrics to Measure How Well Tech Solutions Work

- **Top 3 metrics: achievement of specific project goals (51%); increase in productivity (49%); ease of integration with existing systems (46%);** followed by improved user satisfaction (46%); reduced operational costs (36%); time to get up and running (33%); fewer errors (30%)
- SMBs with 100+ employees rate the achievement of specific project goals as their #1 metric, while smaller SMBs are more likely to place other metrics, including increased productivity, improved user satisfaction, reduced errors, and reduced costs in the top spot
- The top 3 metrics are fairly similar across industries
- **Provide guidance about relevant metrics at the outset of the project to help customers set realistic goals**

# Factors Influencing Contract Renewal/Termination Decisions; and Frequency of Posting Online Reviews

## Factors Influencing Contract Renewal or Termination Decisions

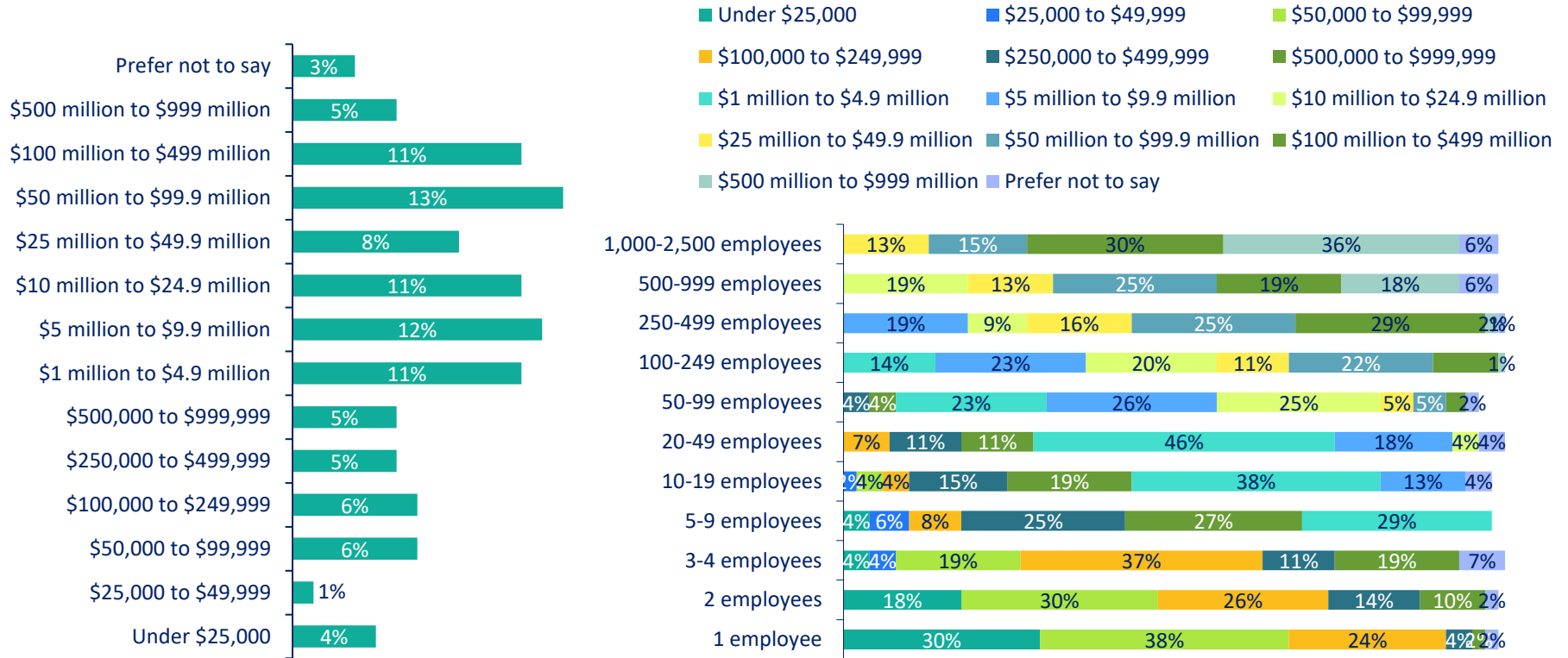
- **Top 3 factors for “strongly influence”:** Quality of customer support (52%); the degree to which the solution helped meet goals (52%); solution cost relative to budget (48%), followed by ability to meet contractual obligations/SLAs (44%); vendor responsiveness to feedback (43%); and availability of other alternatives (33%)
- SMBs with less than 10 employees and those with 1,000-2,500 rate the degree to which the solution helps them to meet goals as the #1 factor, while SMBs with 10-499 employees rank the quality of customer support as the top factor
- The top 3 factors are fairly similar across industries
- **Develop/strengthen proactive programs to measure customer satisfaction with key factors post-implementation with action plans to remediate any areas which are sub-par**

## Frequency of Posting Online Reviews

- **SMB respondents are most likely to post online reviews 1-2 times/year, followed by never (23%); more than 2 times/year (22%); and less than once a year (18%)**
- A majority of respondents from SMBs with 20+ employees say they post at least once/year, while a majority of companies with fewer than 20 employees post less than once a year or never
- Industries most likely to post more than twice/year: IT Services/Technology; Financial Services/Banking/Insurance; and Hospitality
- Industries most likely to never post: NGO/Not for Profit; Personal Services; and Retail and Healthcare (tied)
- **Offer non-monetary incentives to customer advocacy and to share their experiences in online reviews**

# Business Background and Trends

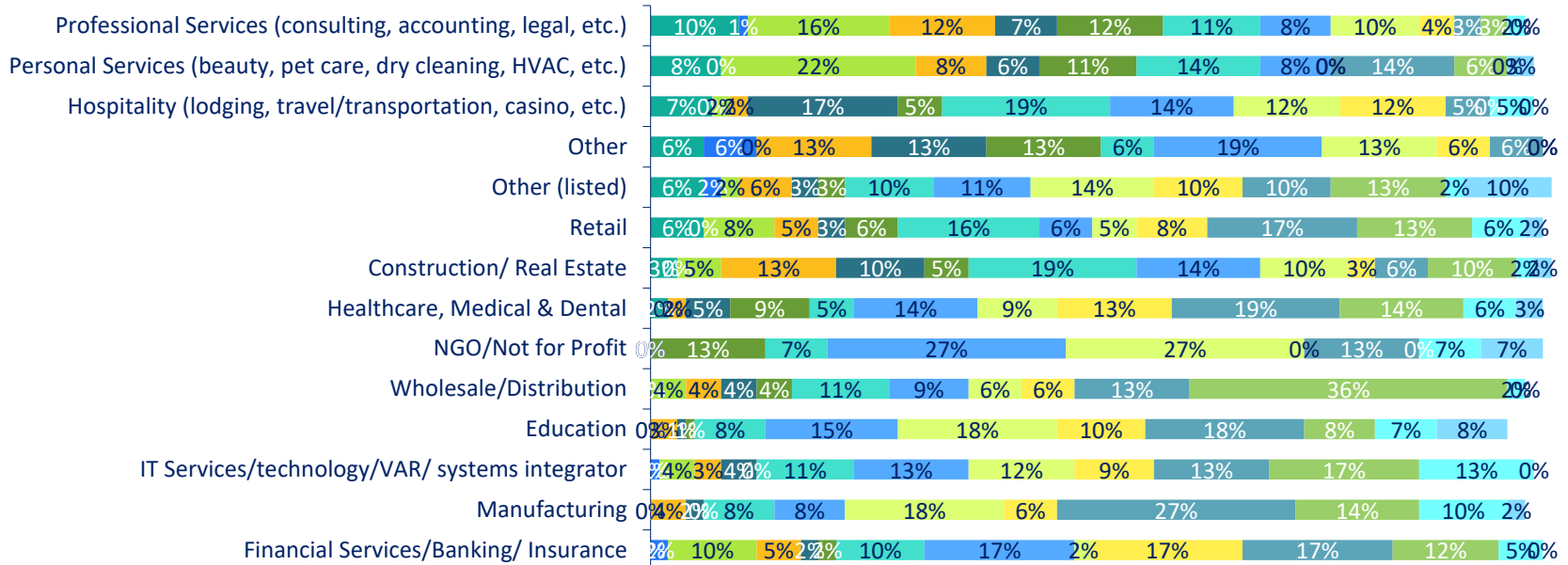
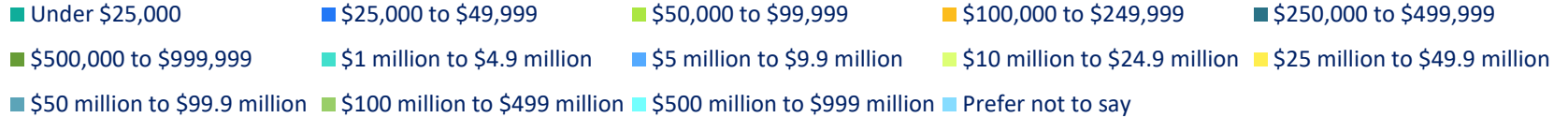
# 2024 Annual Revenue Projections



5) What is your organization's projected annual revenue for the year 2024?, Sample Size = 738

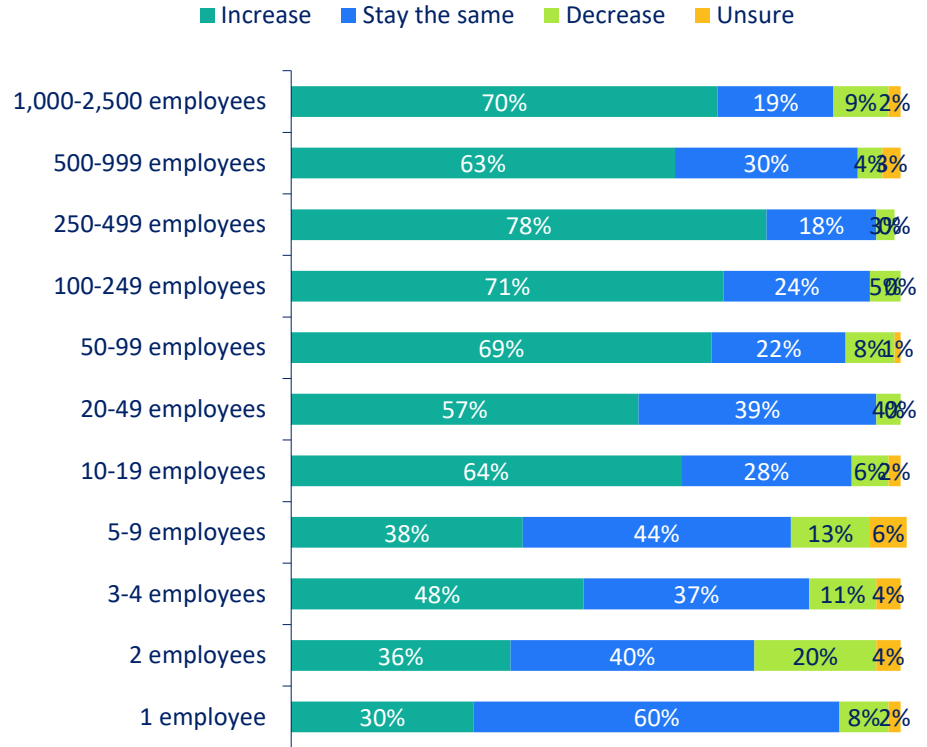
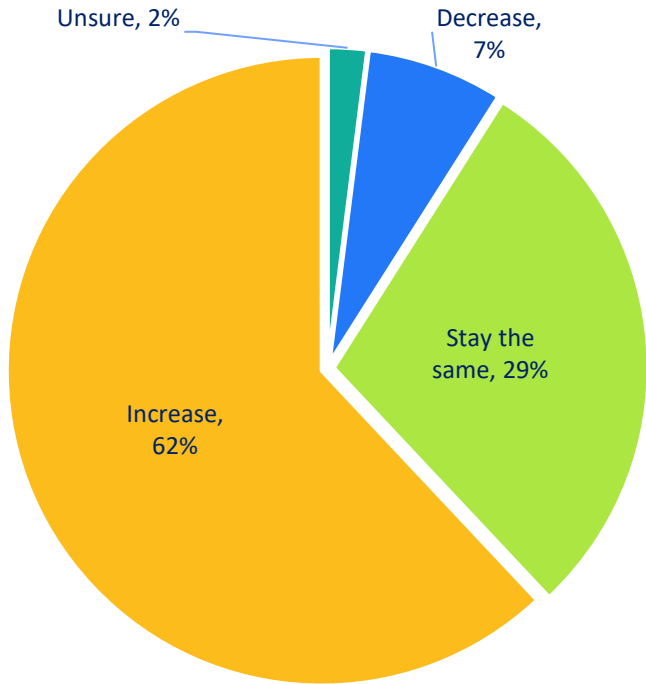


# 2024 Annual Revenue Projections by Industry



5) What is your organization's projected annual revenue for the year 2024?, Sample Size = 738

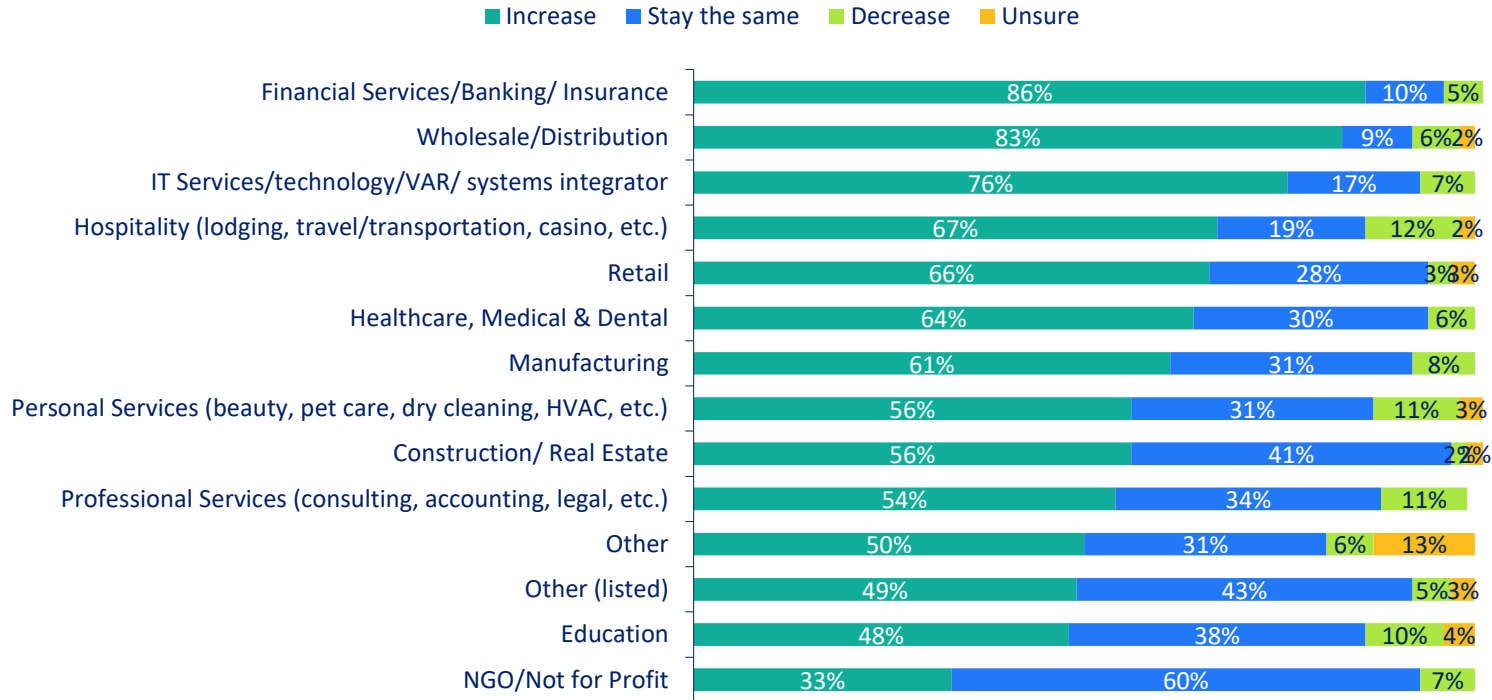
# Expected Change in Revenue from 2023 to 2024



6) Do you expect your organization's 2024 revenue to increase, decrease, or remain the same when compared to 2023 revenue?, Sample

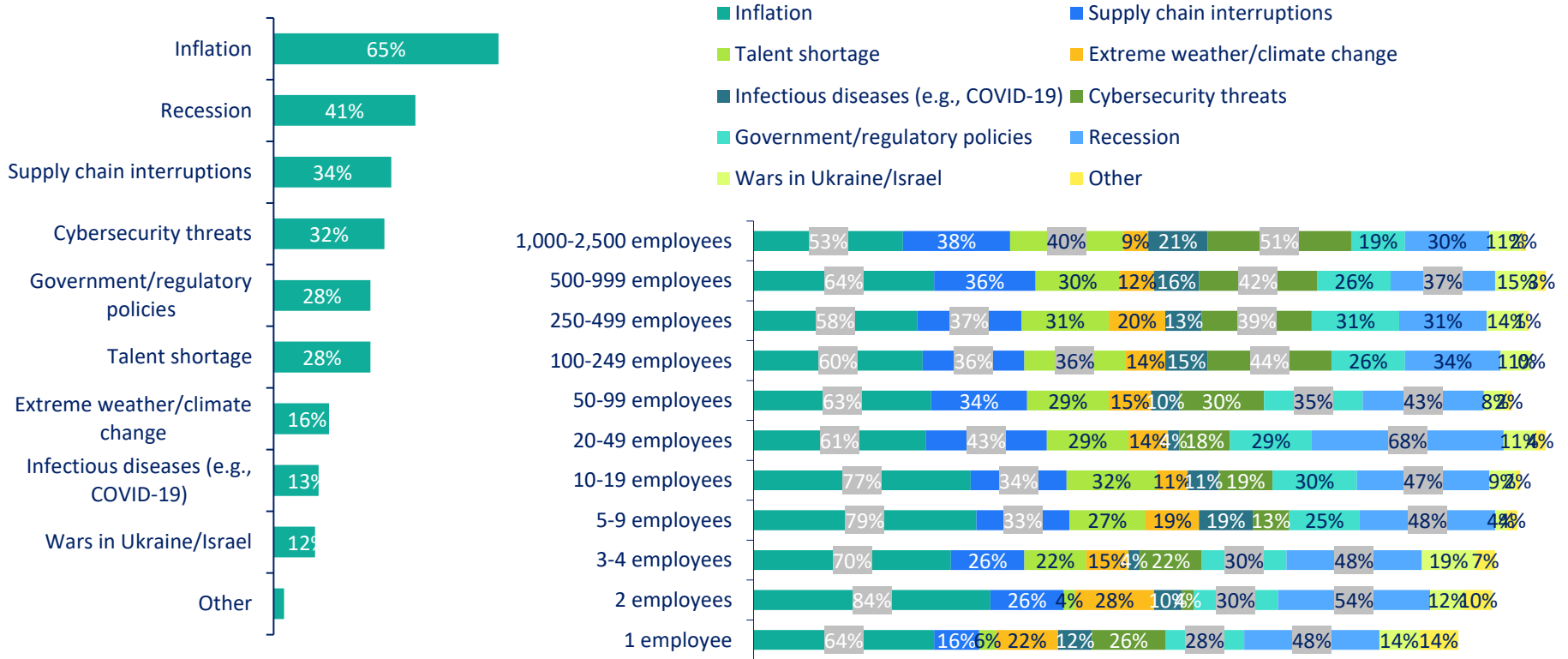
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# Expected Change in Revenue from 2023 to 2024 by Industry



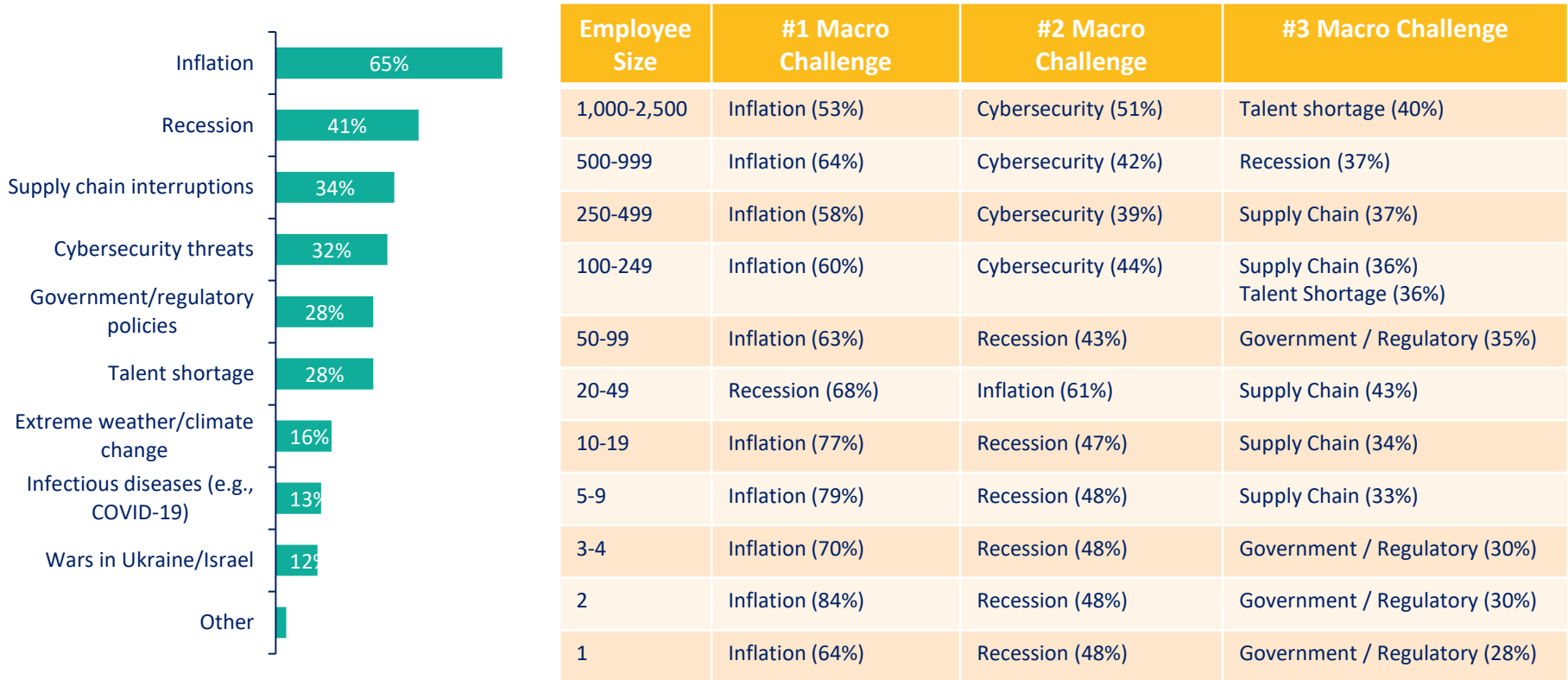
6) Do you expect your organization's 2024 revenue to increase, decrease, or remain the same when compared to 2023 revenue?, Sample Size = 738

# Top Macro Trends SMBs are Concerned About



7) What are the top macro trends that you are most concerned may negatively impact your organization in 2024?, Sample Size = 738 (Select up to 3 responses)

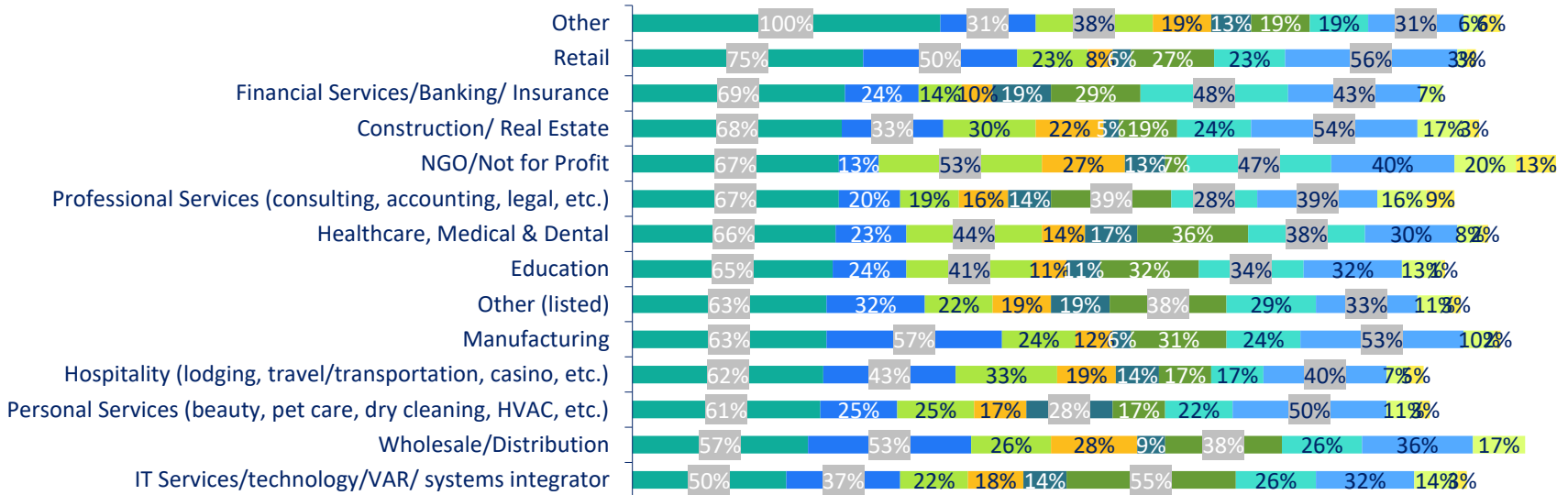
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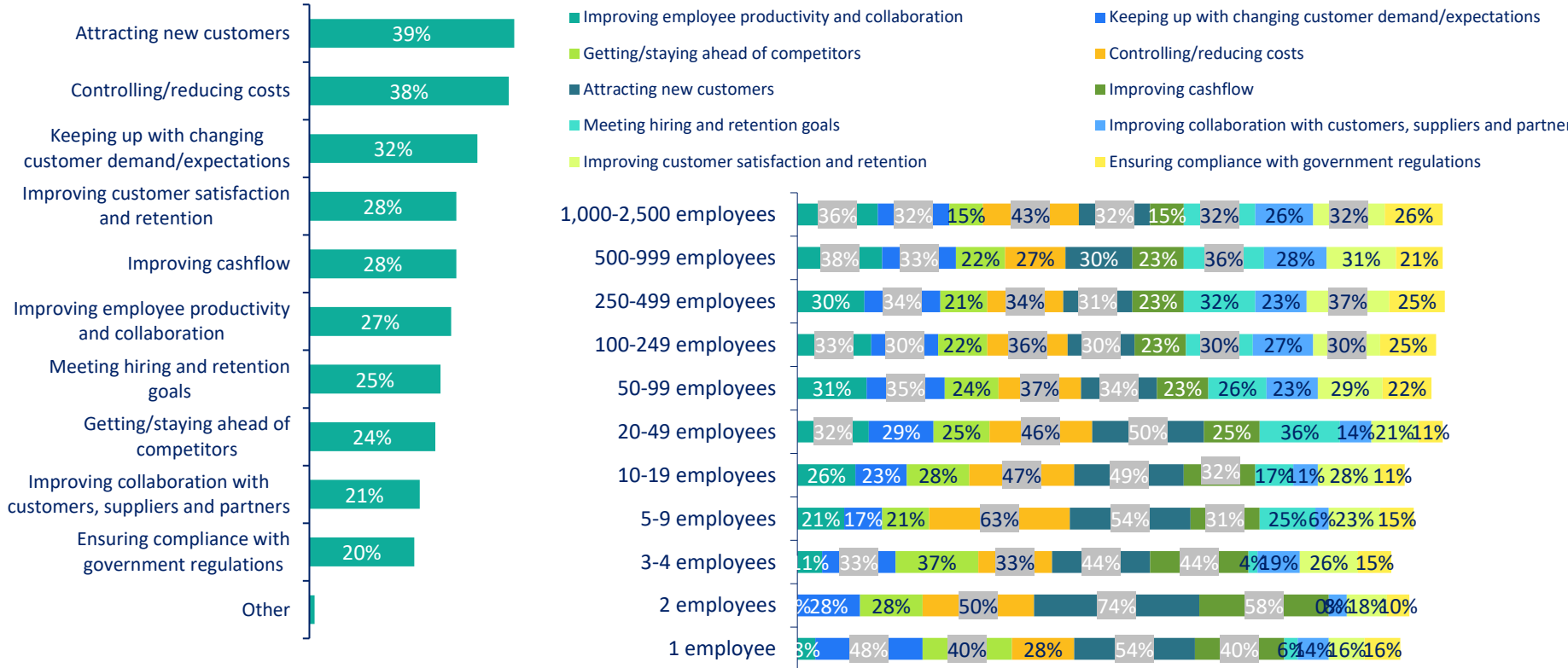
# Top Macro Trends by Industry

- Inflation
- Supply chain interruptions
- Talent shortage
- Extreme weather/climate change
- Infectious diseases (e.g., COVID-19)
- Cybersecurity threats
- Government/regulatory policies
- Recession
- Wars in Ukraine/Israel
- Other



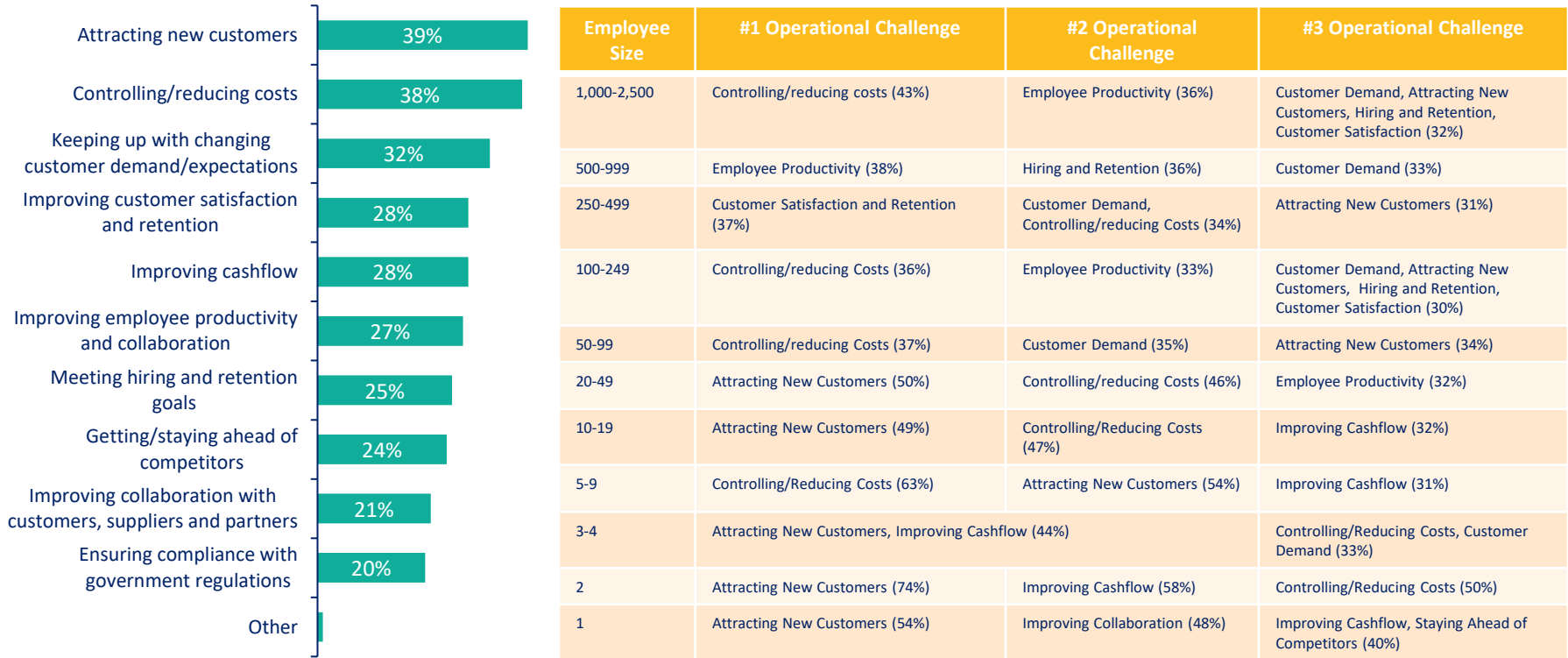
7) What are the top macro trends that you are most concerned may negatively impact your organization in 2024?, Sample Size = 738 (Select up to 3 responses)

# Top Operational Challenges



8) What are the top operational challenges your organization faces? , Sample Size = 738 (Select up to 3 responses)

# Top Operational Challenges

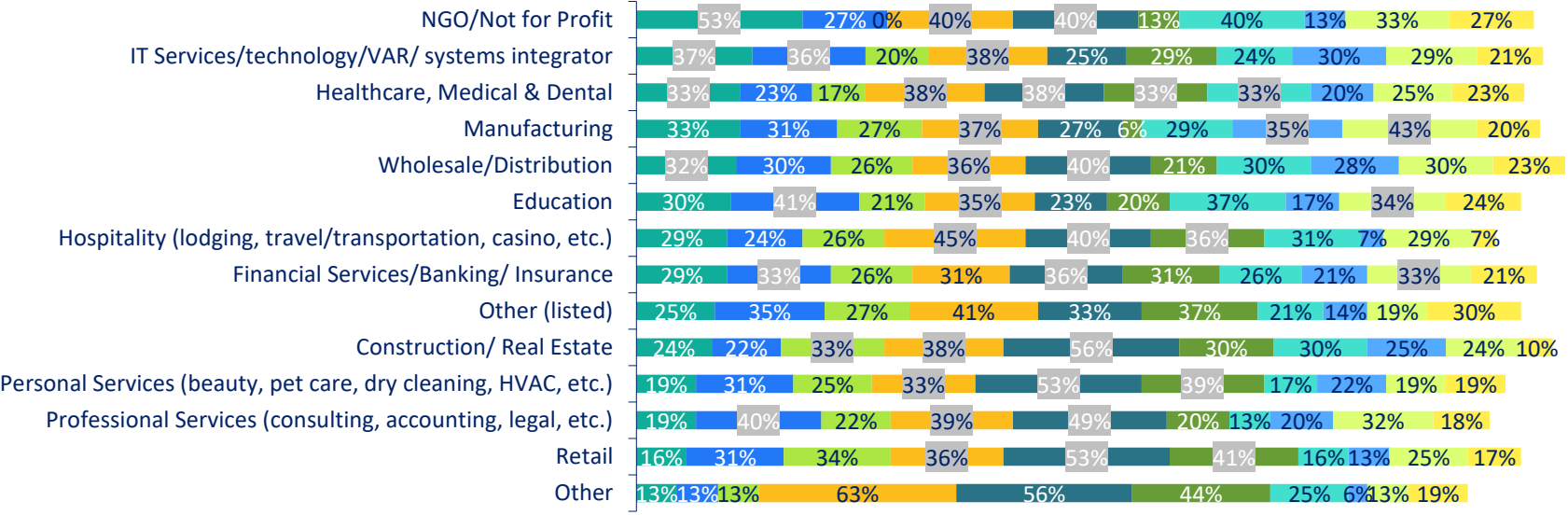


8) What are the top operational challenges your organization faces? , Sample Size = 738 (Select up to 3 responses)



# Top Operational Challenges by Industry

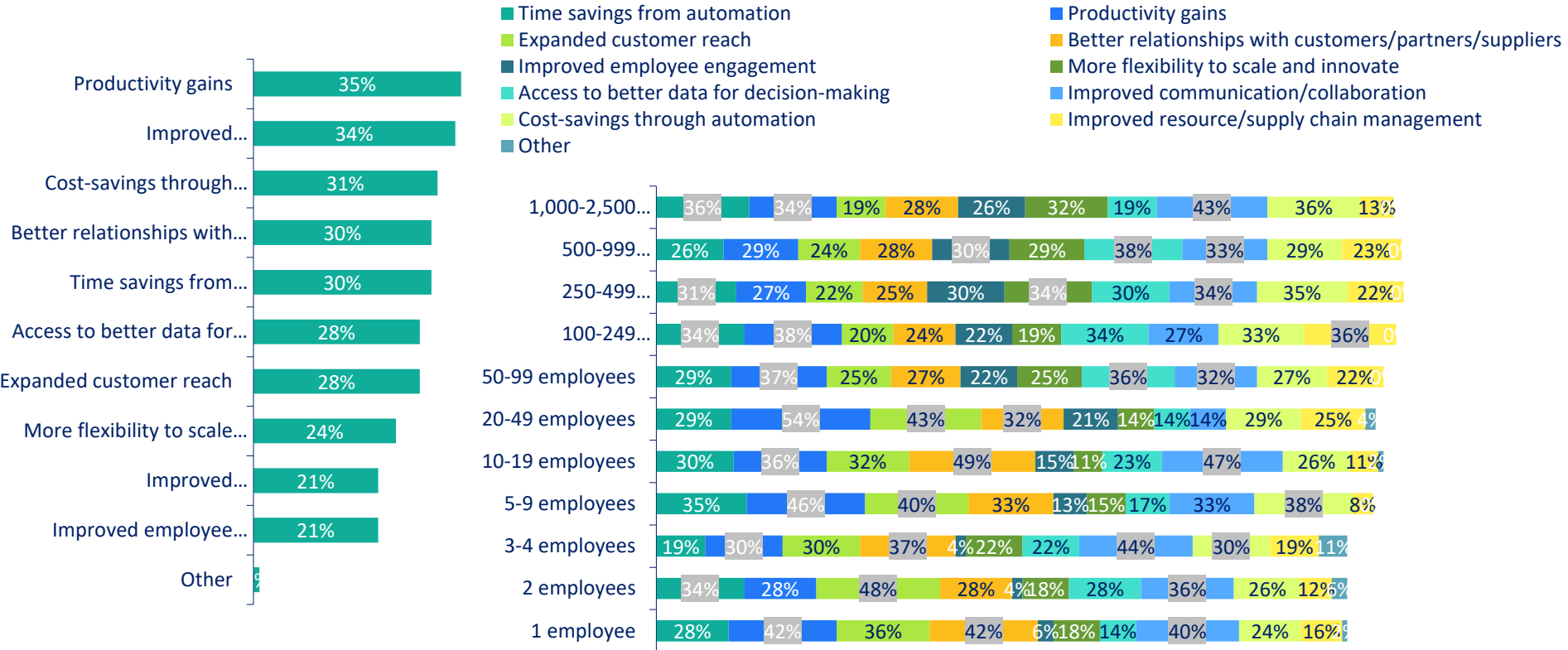
- Improving employee productivity and collaboration
- Keeping up with changing customer demand/expectations
- Getting/staying ahead of competitors
- Controlling/reducing costs
- Attracting new customers
- Improving cashflow
- Meeting hiring and retention goals
- Improving collaboration with customers, suppliers and partners
- Improving customer satisfaction and retention
- Ensuring compliance with government regulations
- Other



8) What are the top operational challenges your organization faces? , Sample Size = 738 (Select up to 3 responses)

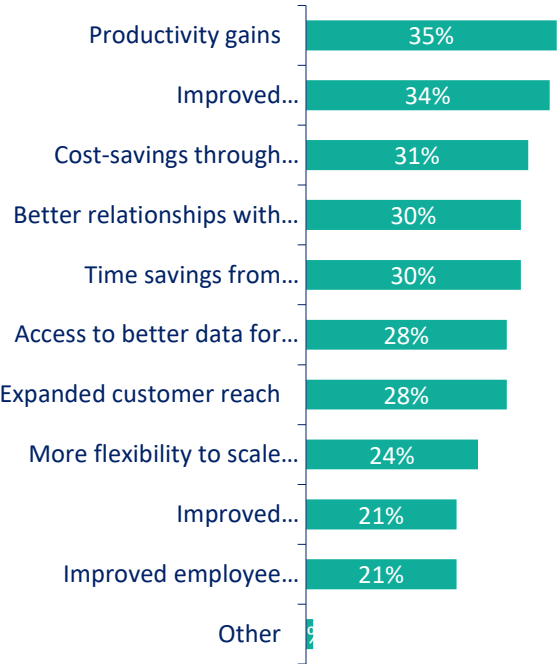
# Technology Background and Trends

# Top Benefits of Technology



15) What are the top benefits that technology provides to your organization ?, Sample Size = 738 (Select up to 3 responses)

# Top Benefits of Technology

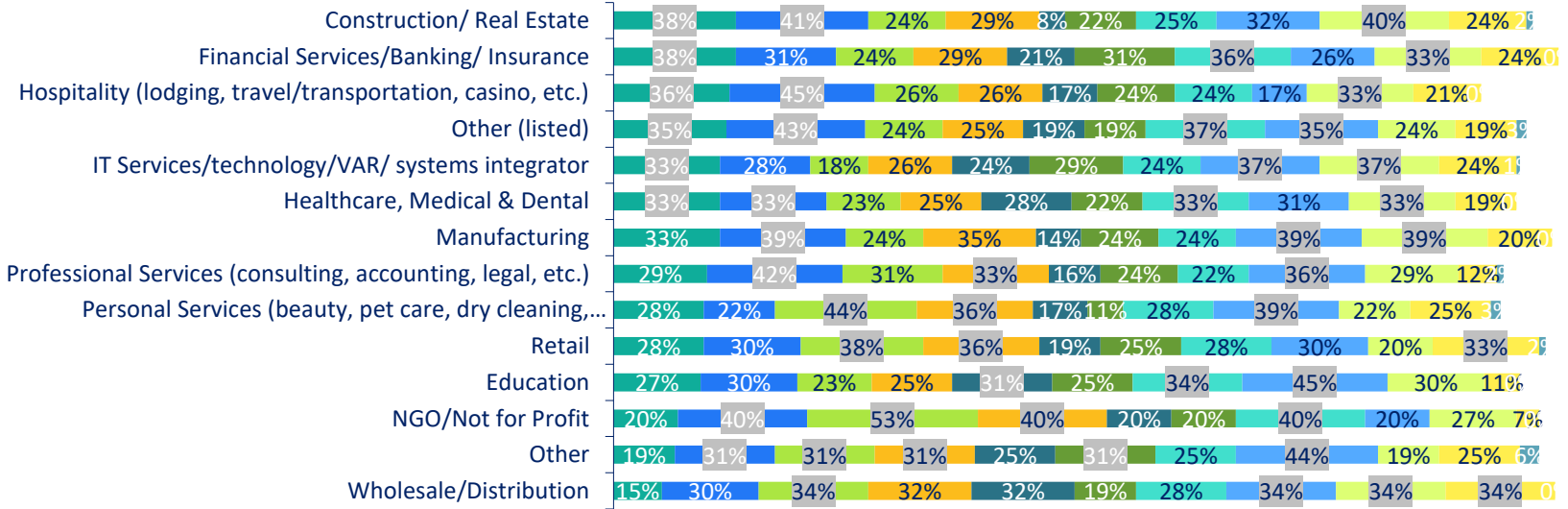


Employee Size	#1 Technology Benefit	#2 Technology Benefit	#3 Technology Benefit
1,000-2,500	Communication and Collaboration (43%)	Time Savings (36%)	Productivity Gains (34%)
500-999	Data for Decision-making (38%)	Communication and Collaboration (33%)	Employee Engagement (30%)
250-499	Flexibility to Scale and Innovate, Communication and Collaboration (34%)		Time Savings (31%)
100-249	Productivity Gains (38%)	Supply Chain Management (36%)	Time Savings (34%)
50-99	Productivity Gains (37%)	Data for Decision-making (36%)	Communication and Collaboration (32%)
20-49	Productivity Gains (54%)	Expanded Customer Reach (43%)	Better Relationships (32%)
10-19	Better Relationships (49%)	Communication and Collaboration (47%)	Productivity Gains (36%)
5-9	Productivity Gains (46%)	Expanded Customer Reach (40%)	Automation Cost Savings (38%)
3-4	Communication and Collaboration (44%)	Better Relationships (37%)	Productivity Gains, Automation Cost Savings (30%)
2	Expanded Customer Reach (48%)	Communication and Collaboration (36%)	Time Savings (34%)
1	Better Relationships, Productivity Gains (42%)		Communication and Collaboration (40%)

15) What are the top benefits that technology provides to your organization ?, Sample Size = 738 (Select up to 3 responses)

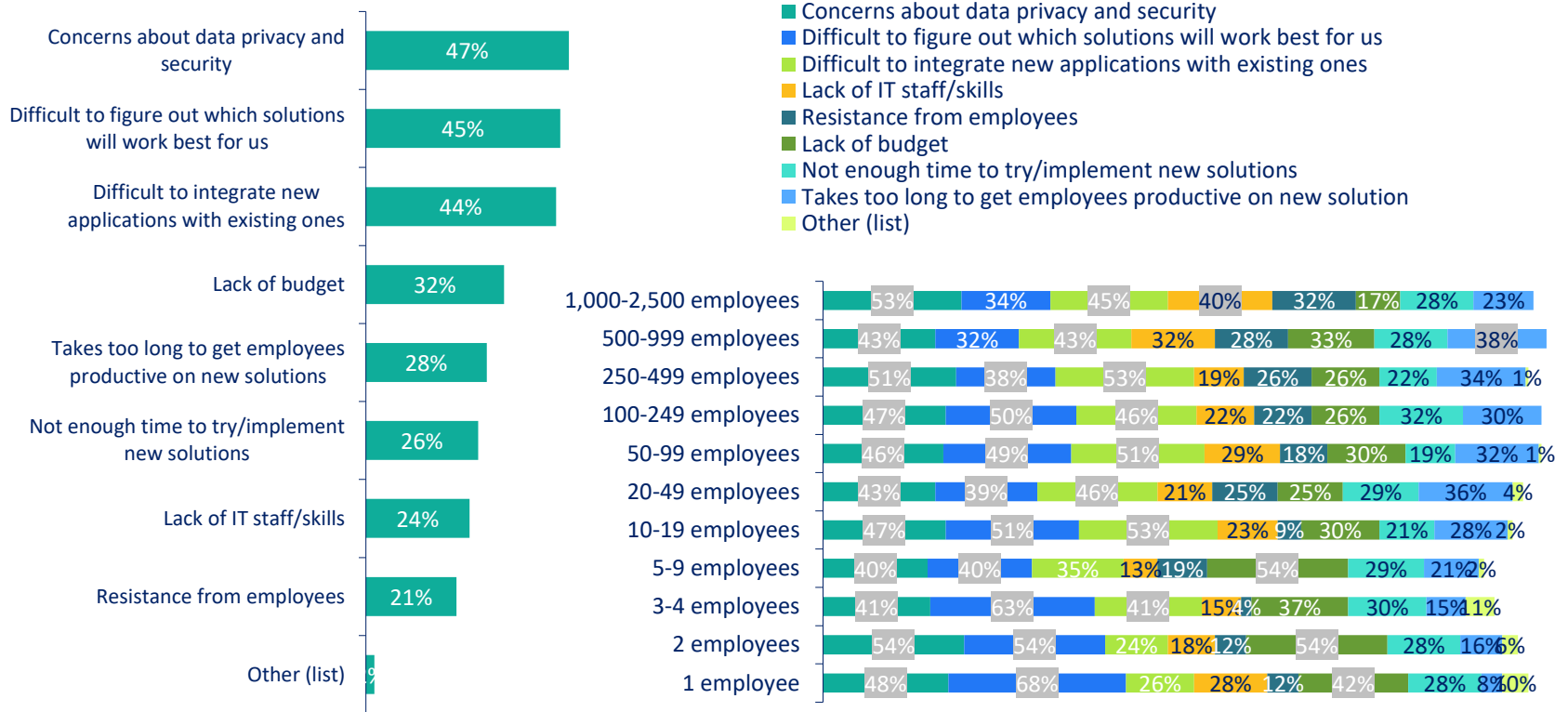
# Top Benefits of Technology by Industry

- Time savings from automation
- Productivity gains
- Expanded customer reach
- Better relationships with customers/partners/suppliers
- Improved employee engagement
- More flexibility to scale and innovate
- Access to better data for decision-making
- Improved communication/collaboration
- Cost-savings through automation
- Improved resource/supply chain management
- Other



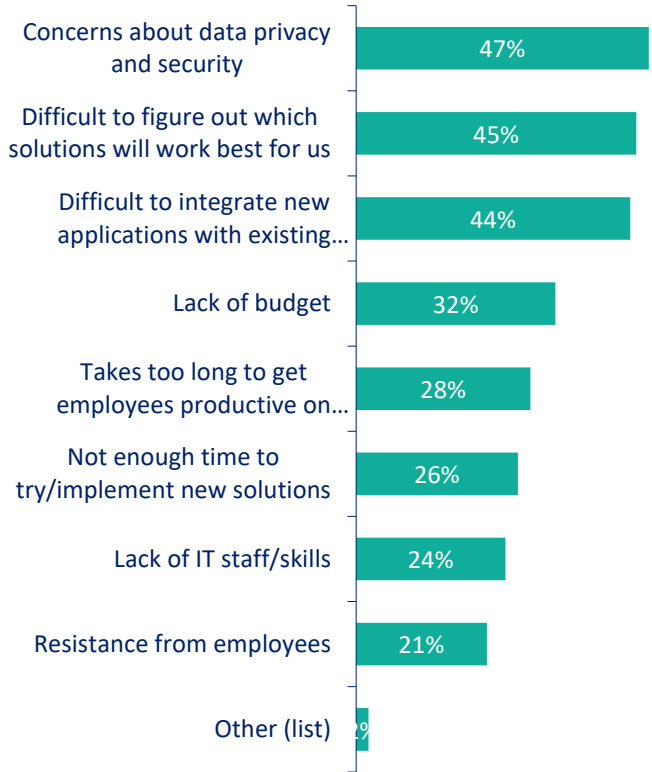
15) What are the top benefits that technology provides to your organization ?, Sample Size = 738

# Top Challenges When Considering New Technology Solutions



14) What are the top technology challenges your organization faces when considering new technology solutions?, Sample Size = 738 (Select up to 3 responses)

# Top Challenges When Considering New Technology Solutions

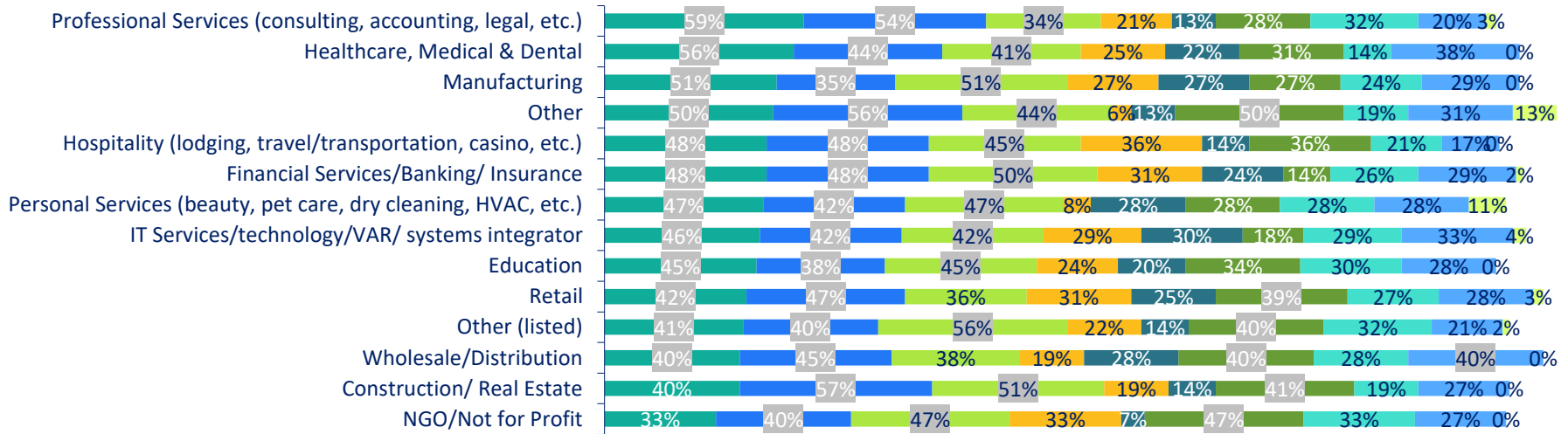


Employee Size	#1 Technology Challenge	#2 Technology Challenge	#3 Technology Challenge
1,000-2,500	Data Privacy & Security (53%)	Integrating New Applications (45%)	Lack of IT Skills/Staff (40%)
500-999	Data Privacy & Security (43%)	Integrating New Applications (43%)	Takes Too Long (38%)
250-499	Integrating New Applications (53%)	Data Privacy & Security (51%)	Determining Best Solutions (38%)
100-249	Determining Best Solutions (50%)	Data Privacy & Security (47%)	Integrating New Applications (46%)
50-99	Integrating New Applications (51%)	Determining Best Solutions (49%)	Data Privacy & Security (46%)
20-49	Integrating New Applications (46%)	Data Privacy & Security (43%)	Determining Best Solutions (39%)
10-19	Integrating New Applications (53%)	Determining Best Solutions (51%)	Data Privacy & Security (47%)
5-9	Lack of Budget (54%)	Data Privacy & Security (40%)	Determining Best Solutions (40%)
3-4	Determining Best Solutions (63%)	Data Privacy & Security (41%)	Integrating New Applications (41%)
2	Data Privacy & Security, Determining Best Solutions, Lack of Budget, (54%)		
1	Determining Best Solutions (68%)	Data Privacy & Security (48%)	Lack of Budget (42%)

14) What are the top technology challenges your organization faces when considering new technology solutions?, Sample Size = 738 (Select up to 3 responses)

# Top Challenges When Considering New Technology Solutions by Industry

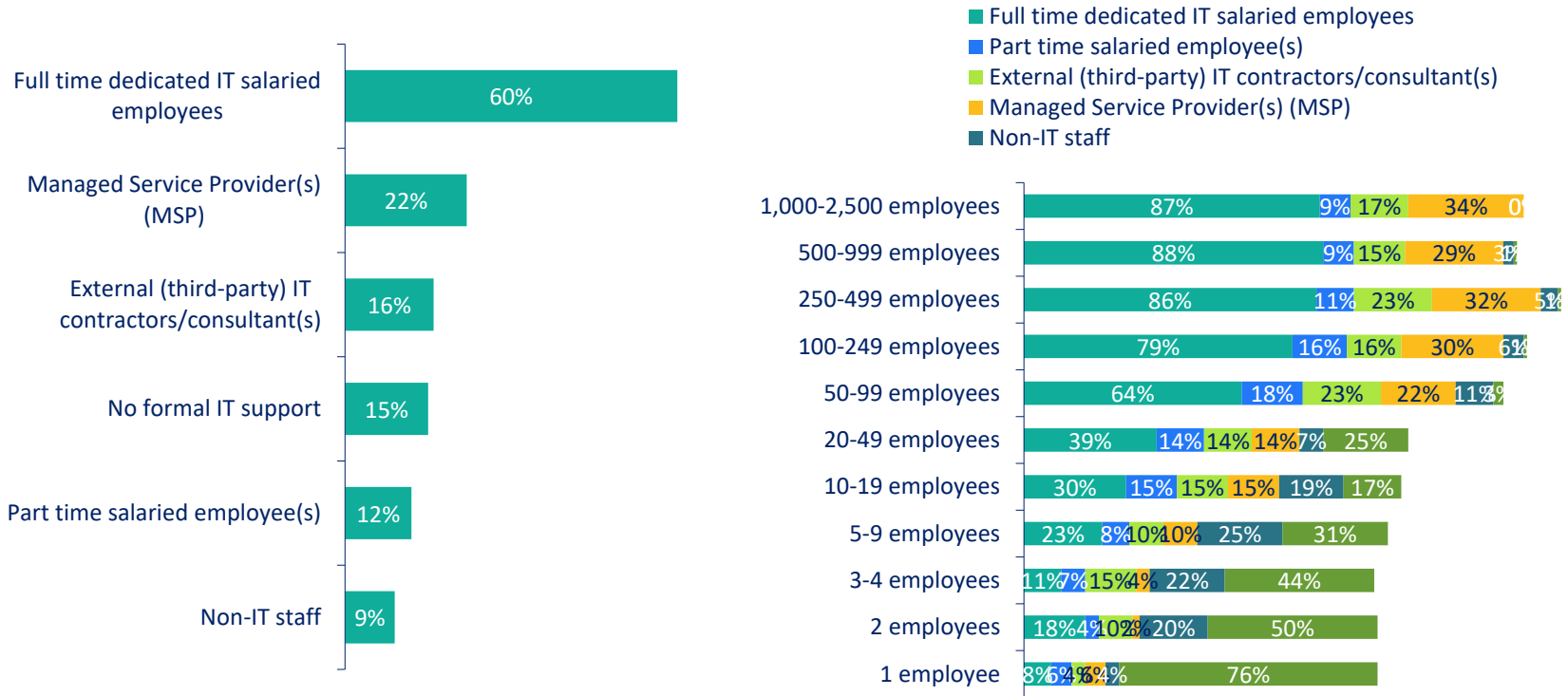
- Concerns about data privacy and security
- Difficult to figure out which solutions will work best for us
- Difficult to integrate new applications with existing ones
- Lack of IT staff/skills
- Resistance from employees
- Lack of budget
- Not enough time to try/implement new solutions
- Takes too long to get employees productive on new solutions
- Other (list)



14) What are the top technology challenges your organization faces when considering new technology solutions?, Sample Size = 738



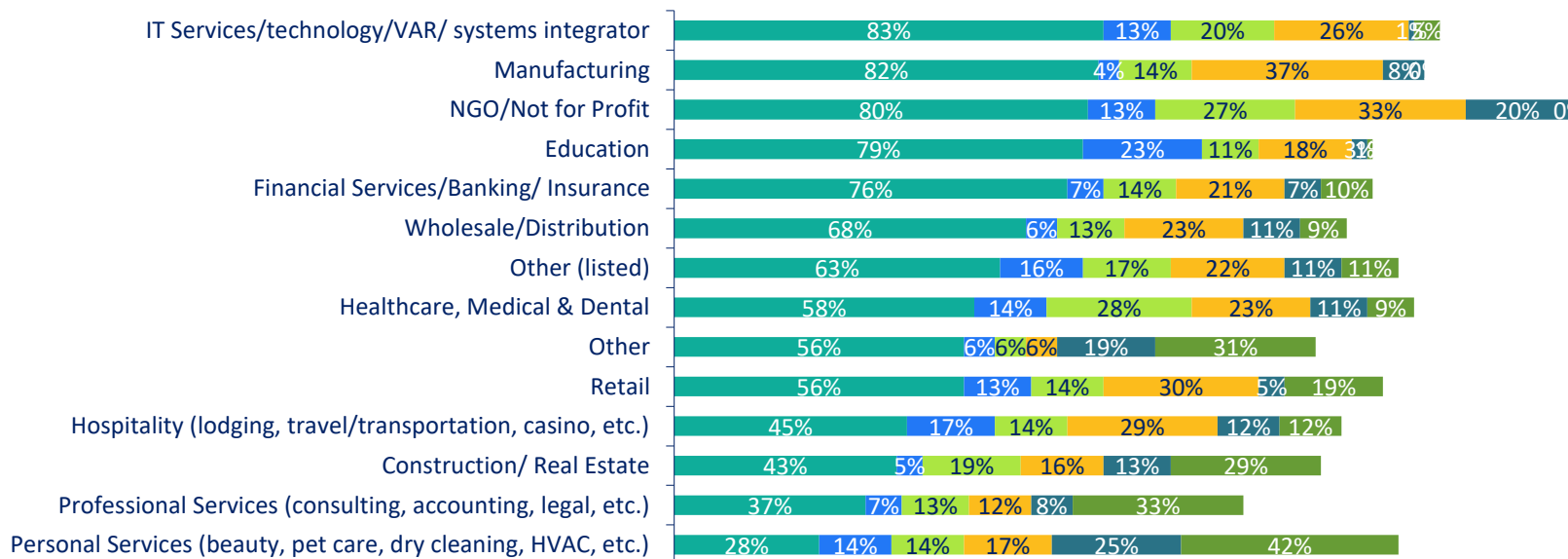
# Responsibility for IT Support, Implementation and Management



16) Who is responsible for supporting, managing, and implementing technology solutions for your organization?, Sample Size = 738 (Select as many as apply)

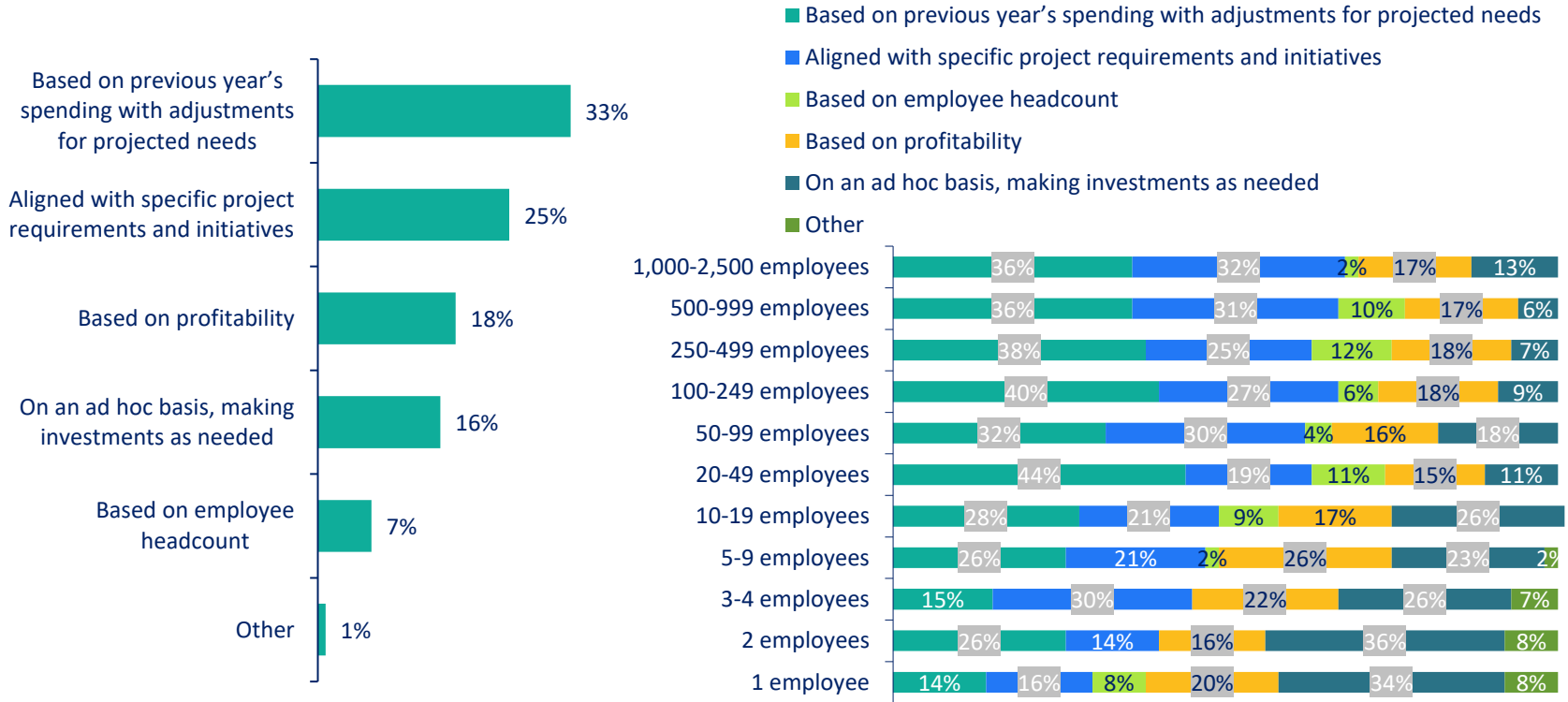
# Responsibility for IT Support, Implementation and Management

- Full time dedicated IT salaried employees
- External (third-party) IT contractors/consultant(s)
- Non-IT staff
- Part time salaried employee(s)
- Managed Service Provider(s) (MSP)
- No formal IT support



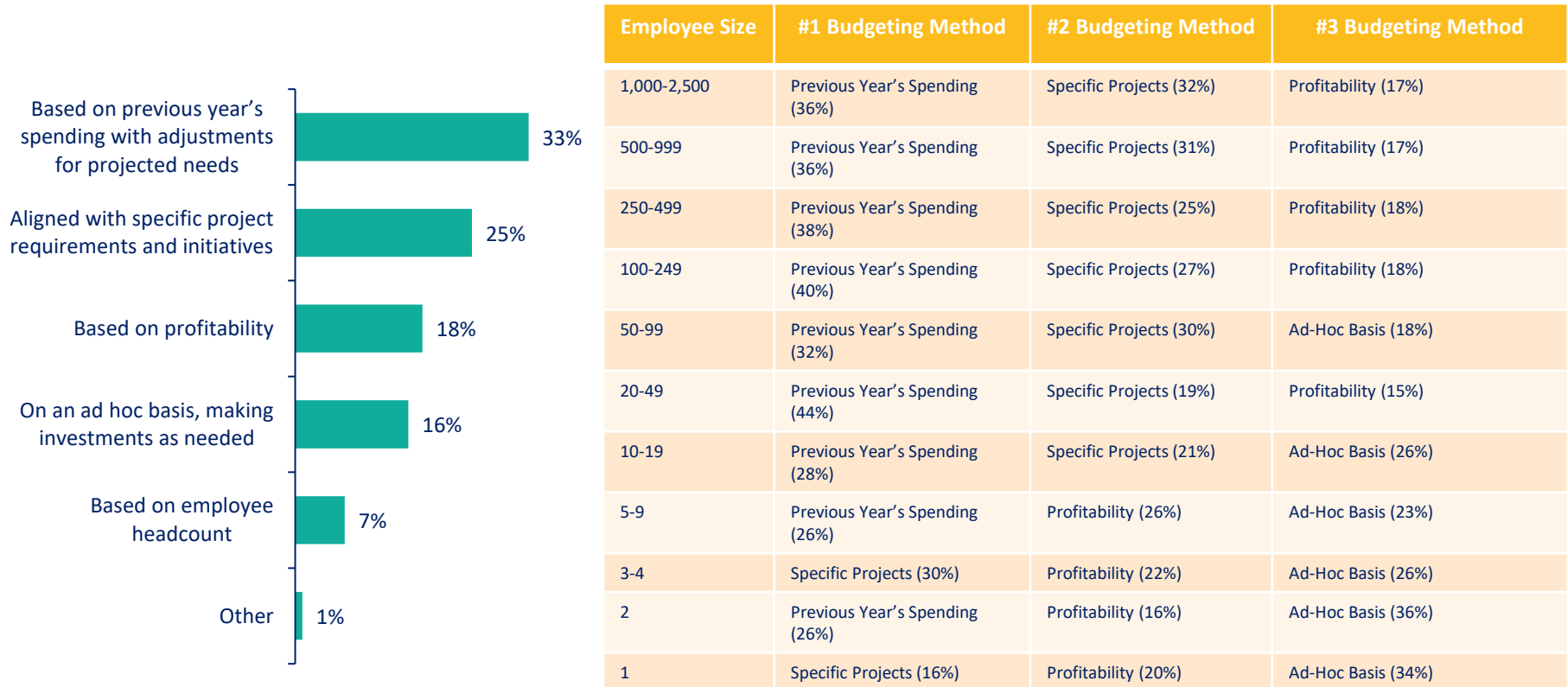
16) Who is responsible for supporting, managing, and implementing technology solutions for your organization?, Sample Size = 738 (Select as many as apply)

# How SMBs Determine Technology Budgets



11) How does your organization determine its annual technology budget?, Sample Size = 735

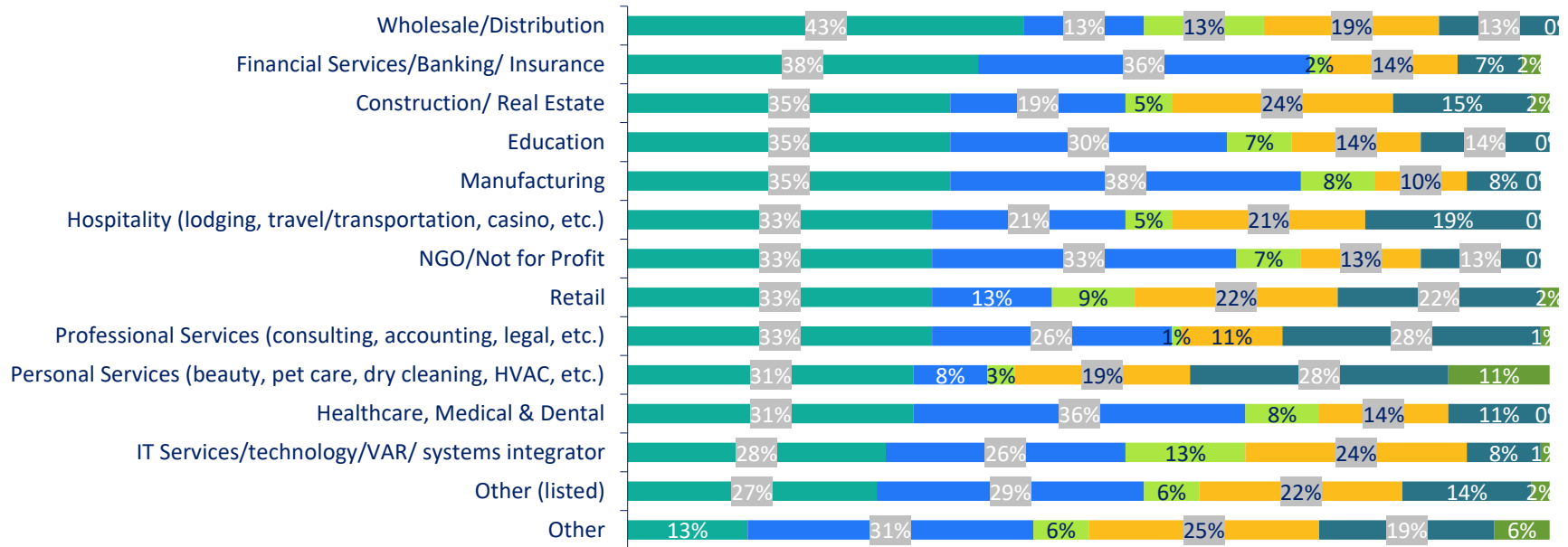
# How SMBs Determine Technology Budgets



11) How does your organization determine its annual technology budget?, Sample Size = 735

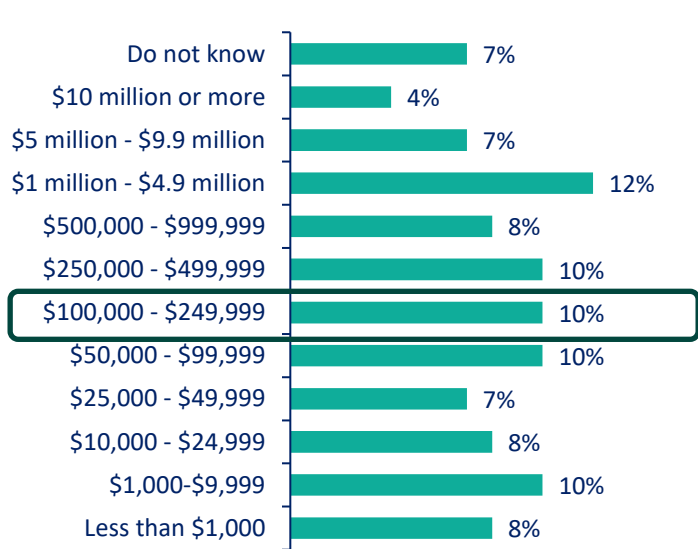
# How SMBs Determine Technology Budgets by Industry

- Based on previous year's spending with adjustments for projected needs
- Aligned with specific project requirements and initiatives
- Based on employee headcount
- Based on profitability
- On an ad hoc basis, making investments as needed
- Other

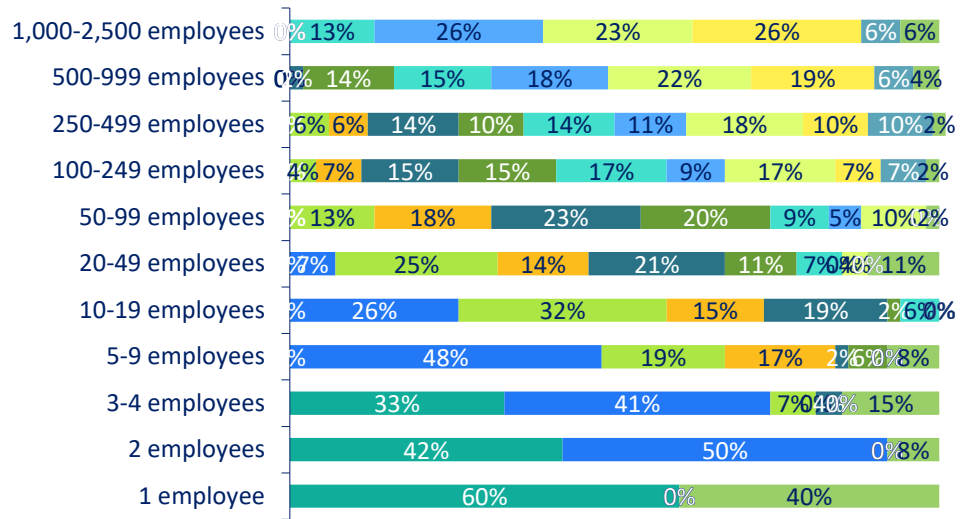
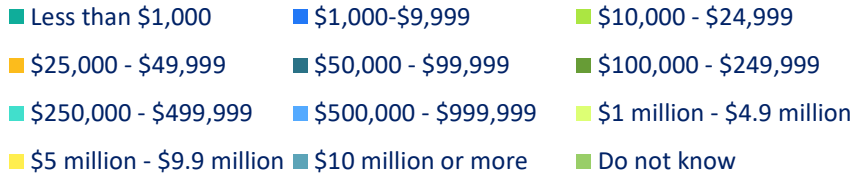


11) How does your organization determine its annual technology budget?, Sample Size = 735

# 2024 Spending on Technology Solutions

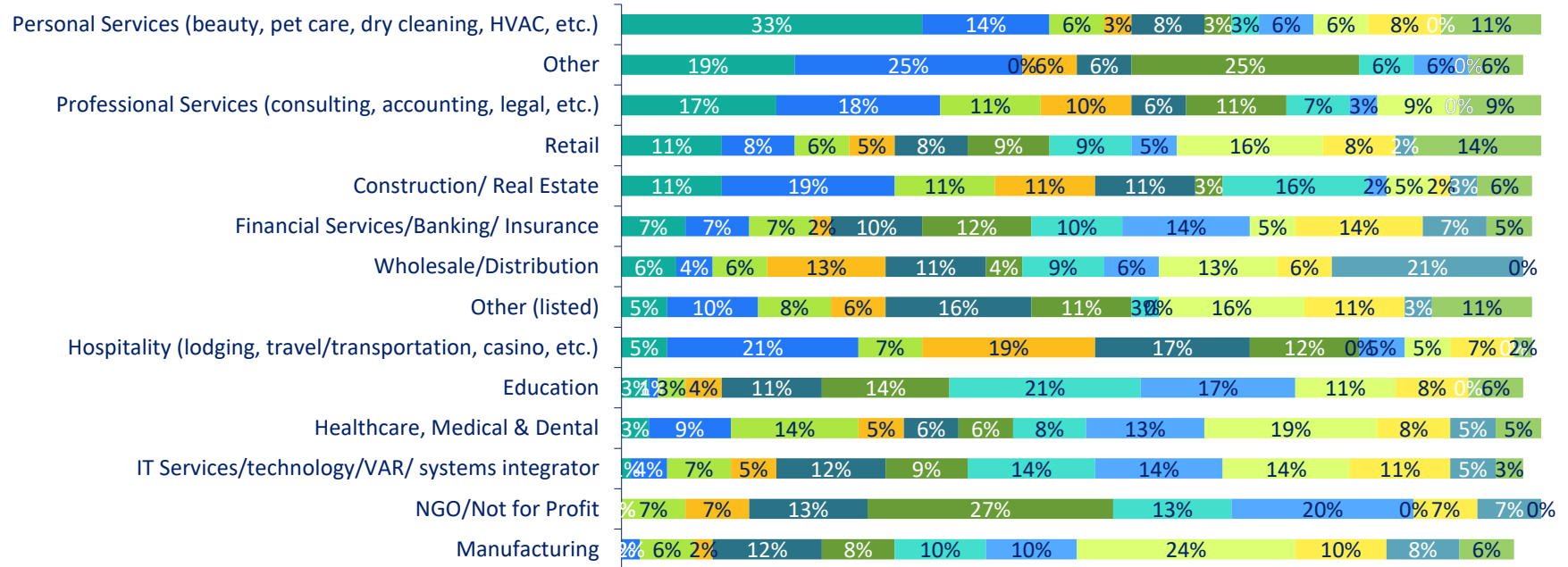


Median spending: \$175,000



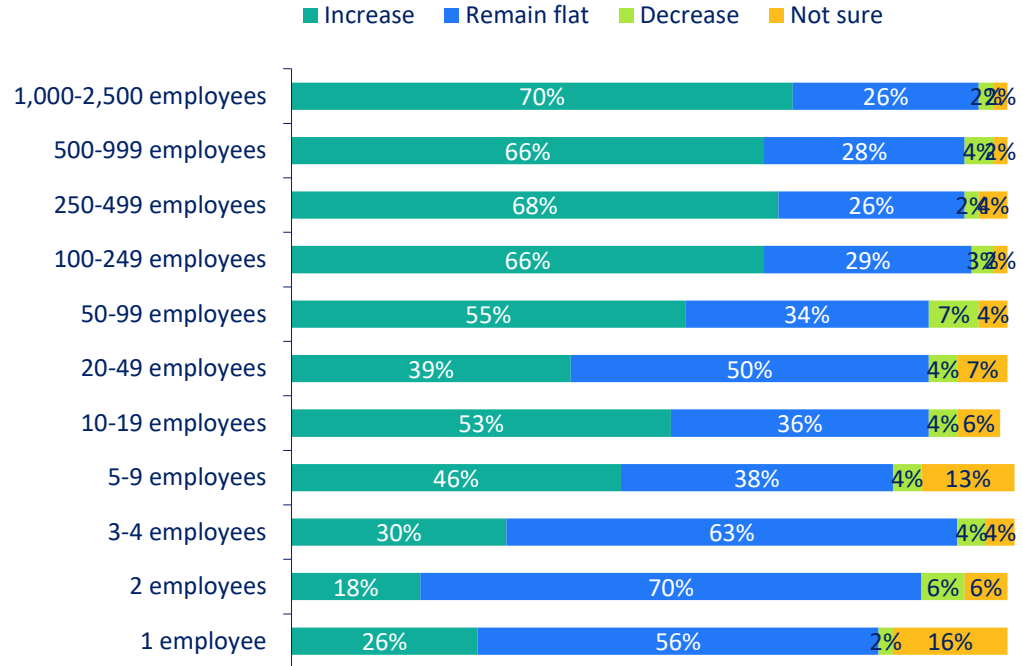
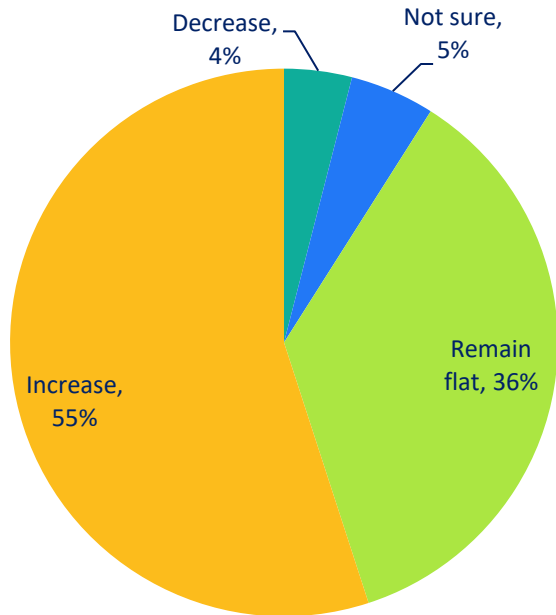
10) Approximately how much will your organization spend on technology solutions for 2024? (EXCLUDE salaries) , Sample Size = 738

# 2024 Spending on Technology Solutions by Industry



10) Approximately how much will your organization spend on technology solutions for 2024? (EXCLUDE salaries) , Sample Size = 738

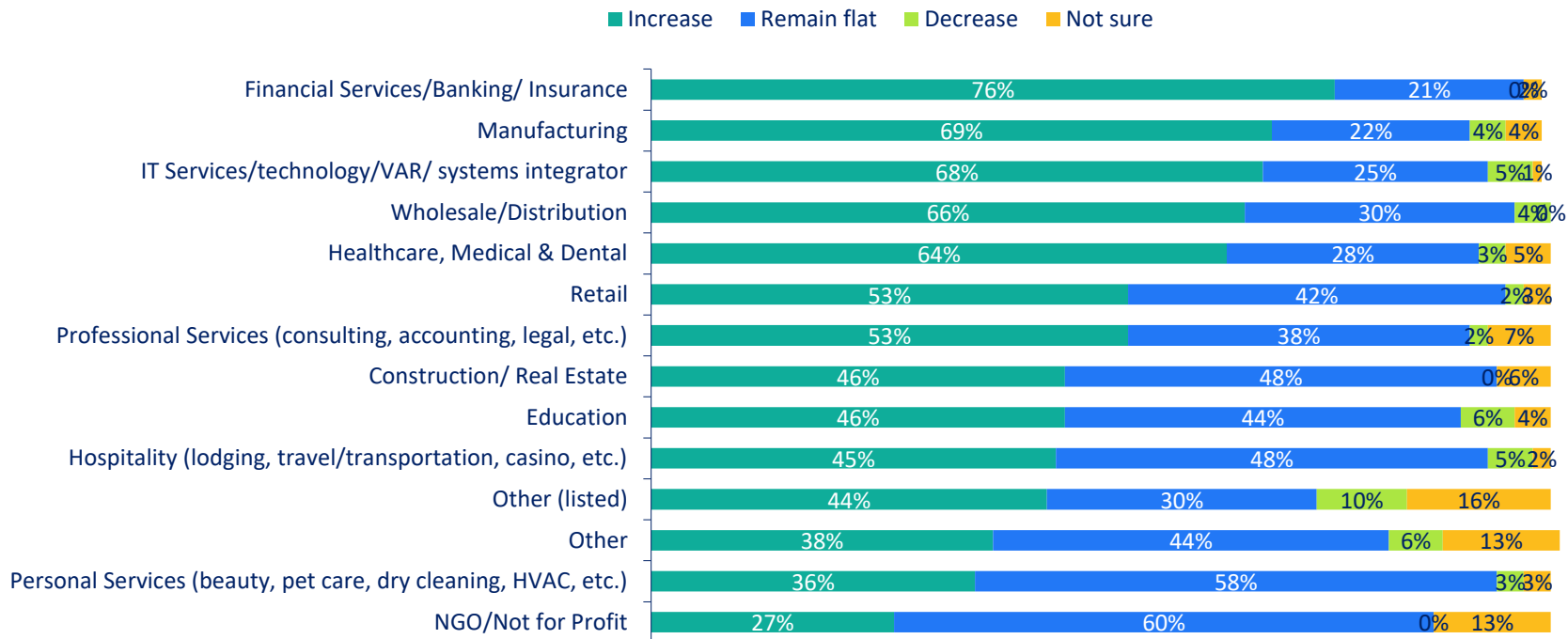
# Expected Change in Technology Spending



12) Do you expect your organization's overall technology spending to increase, decrease, or remain flat in the next fiscal year (as compared to the current one)?  
 Sample Size = 738



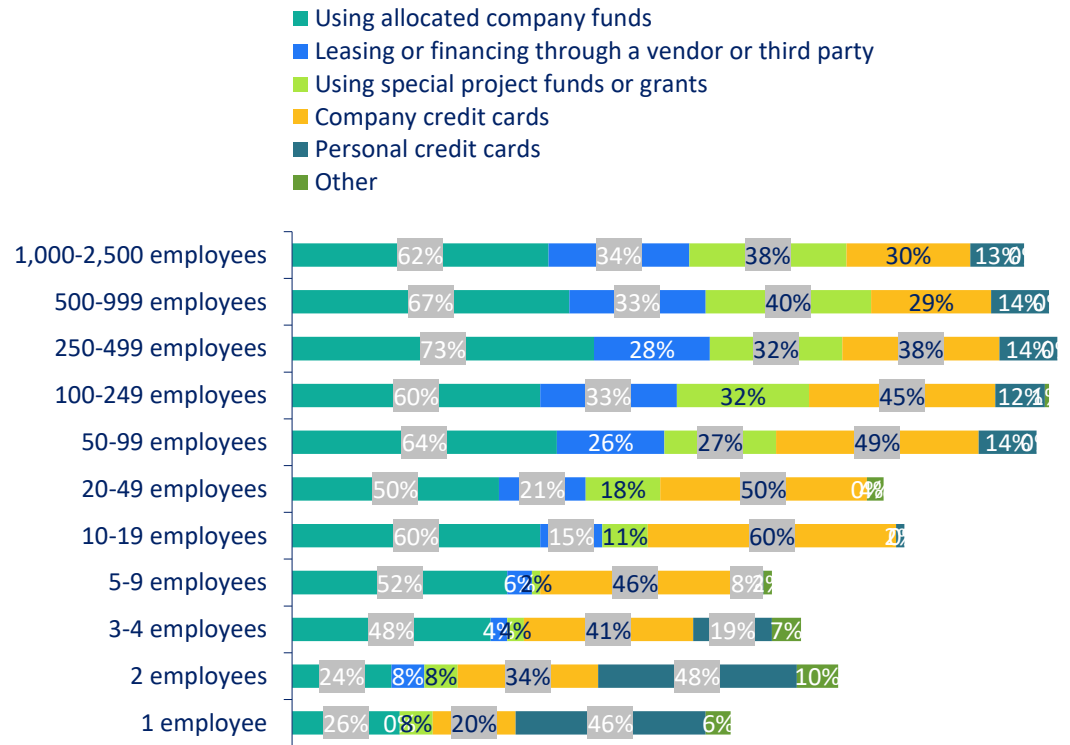
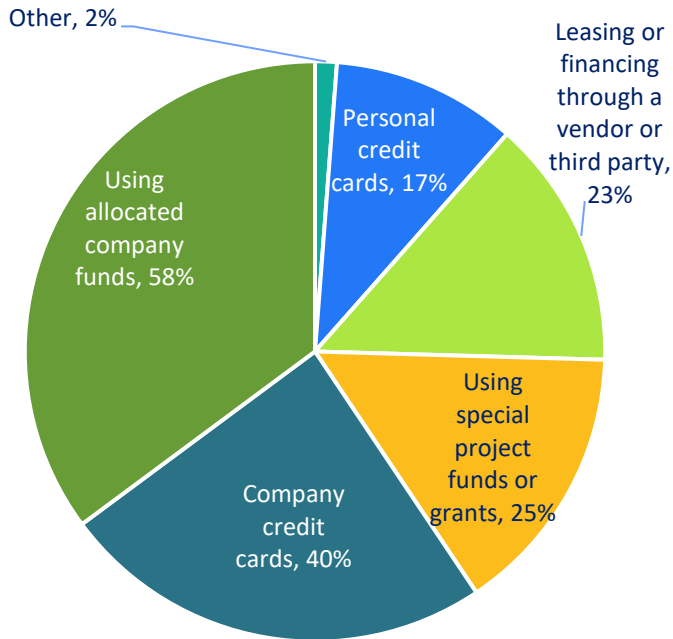
# Expected Change in Technology Spending by Industry



12) Do you expect your organization's overall technology spending to increase, decrease, or remain flat in the next fiscal year (as compared to the current one)?

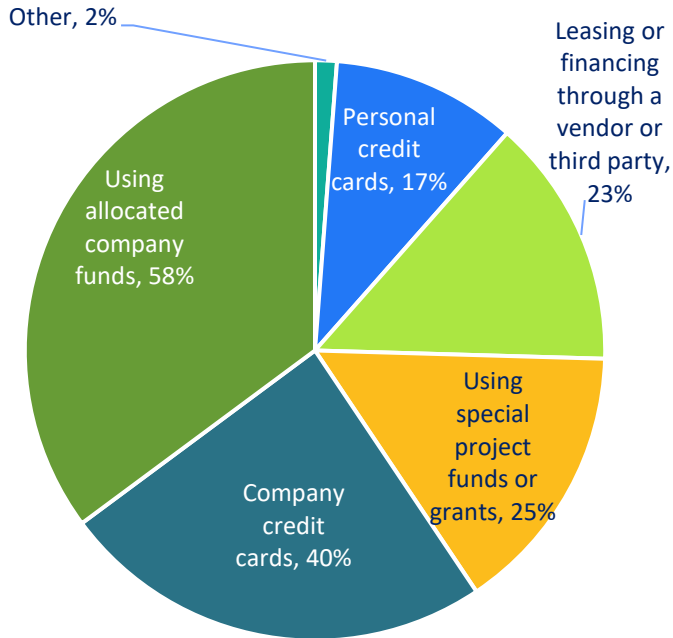
Sample Size = 738

# How SMBs Finance Technology Purchases



20) Which of the following has your organization used to finance technology purchases in the last 2 years?, Sample Size = 738 (Select all that apply)

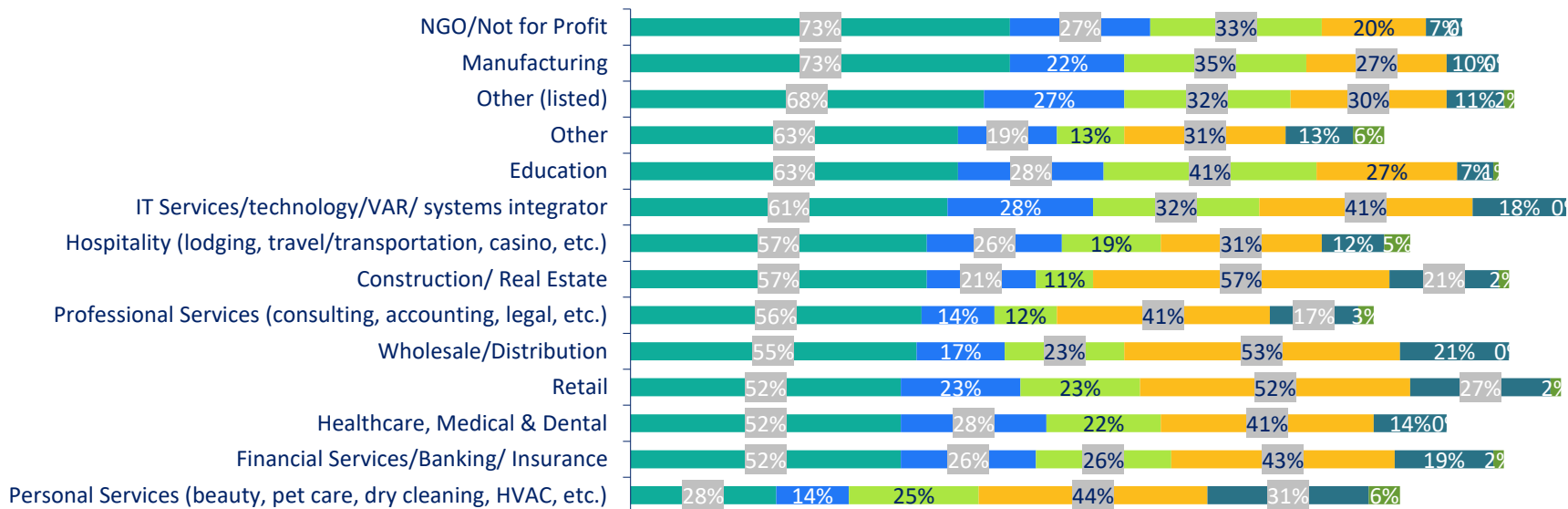
# How SMBs Finance Technology Purchases



Employee Size	#1 Financing Method	#2 Financing Method	#3 Financing Method
1,000-2,500	Allocated Company Funds (62%)	Special Project Funds (38%)	Vendor Leasing or Financing (34%)
500-999	Allocated Company Funds (67%)	Special Project Funds (40%)	Vendor Leasing or Financing (33%)
250-499	Allocated Company Funds (73%)	Company Credit Cards (38%)	Special Project Funds (32%)
100-249	Allocated Company Funds (60%)	Company Credit Cards (45%)	Vendor Leasing or Financing (33%)
50-99	Allocated Company Funds (64%)	Company Credit Cards (49%)	Vendor Leasing or Financing (27%)
20-49	Allocated Company Funds, Vendor Leasing or Financing (50%)		Vendor Leasing or Financing (21%)
10-19	Allocated Company Funds, Vendor Leasing or Financing (60%)		Vendor Leasing or Financing (15%)
5-9	Allocated Company Funds (52%)	Company Credit Cards (46%)	Other (8%)
3-4	Allocated Company Funds (48%)	Company Credit Cards (41%)	Personal Credit Cards (19%)
2	Personal Credit Cards (48%)	Company Credit Cards (34%)	Allocated Company Funds (24%)
1	Personal Credit Cards (46%)	Allocated Company Funds (26%)	Company Credit Cards (20%)

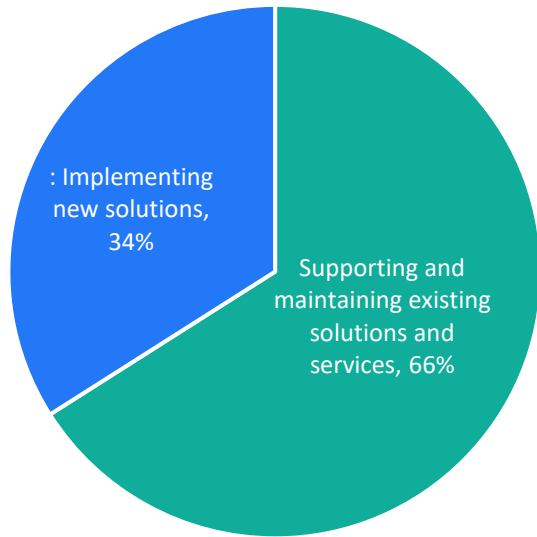
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# How SMBs Finance Technology Purchases by Industry



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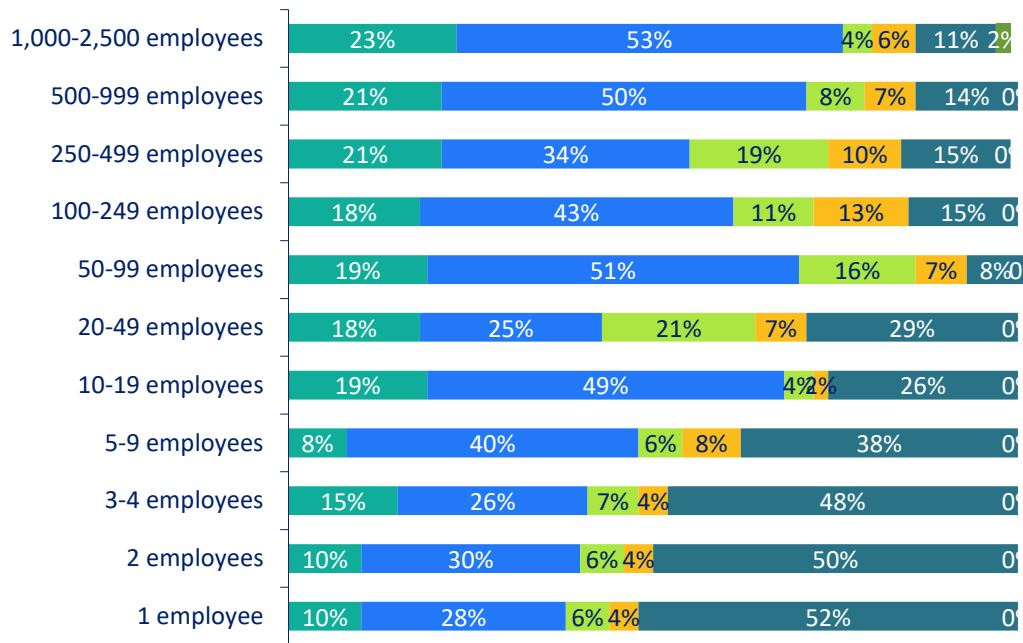
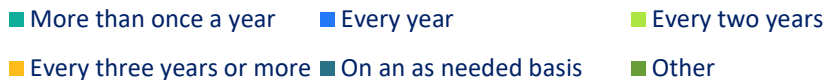
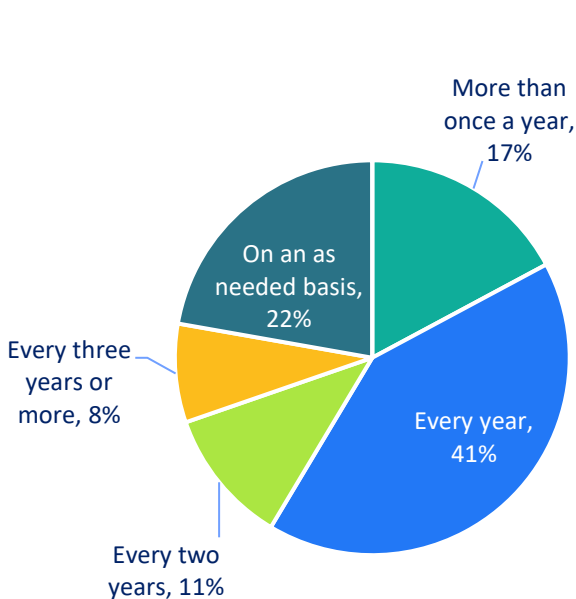
# Annual Technology Budget Allocation Spent On Existing vs New Solutions



Q3: No. of employees	Q18_1: Supporting and maintaining existing solutions and services	Q18_2: Implementing new solutions
<b>1 employee</b>	76%	24%
<b>2 employees</b>	74%	26%
<b>3-4 employees</b>	70%	30%
<b>5-9 employees</b>	69%	31%
<b>10-19 employees</b>	66%	34%
<b>20-49 employees</b>	69%	31%
<b>50-99 employees</b>	64%	36%
<b>100-249 employees</b>	60%	40%
<b>250-499 employees</b>	61%	39%
<b>500-999 employees</b>	62%	38%
<b>1,000-2,500 employees</b>	60%	40%

18) What percentage of your annual technology budget does your organization typically allocate to each of the following::, Sample Size = 738

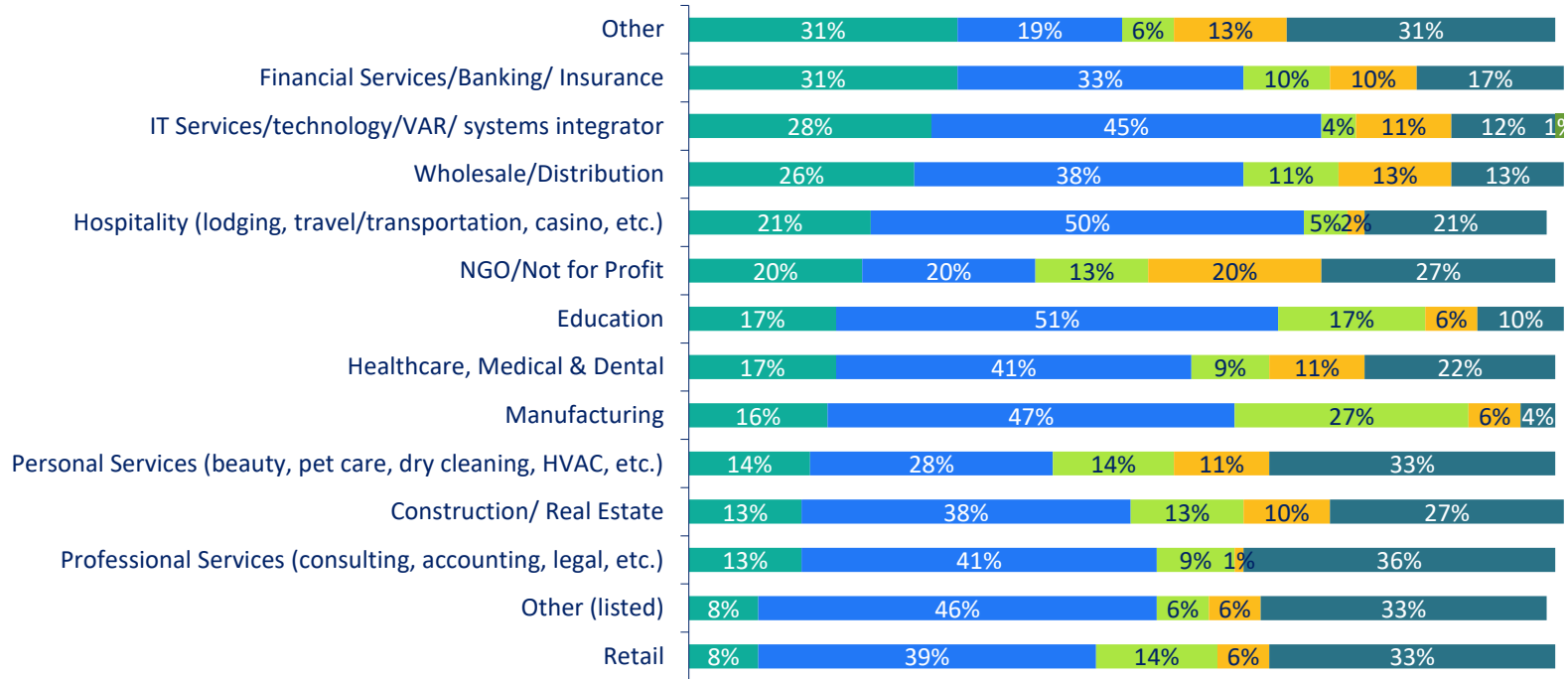
# How Often SMBs Reevaluate Their Technology Stack/Solutions



19) How often does your organization re-evaluate its technology stack to consider new solutions or upgrades?, Sample Size = 738

# How Often SMBs Reevaluate Their Technology Stack/Solutions by Industry

■ More than once a year  
 ■ Every year  
 ■ Every two years  
 ■ Every three years or more  
 ■ On an as needed basis  
 ■ Other

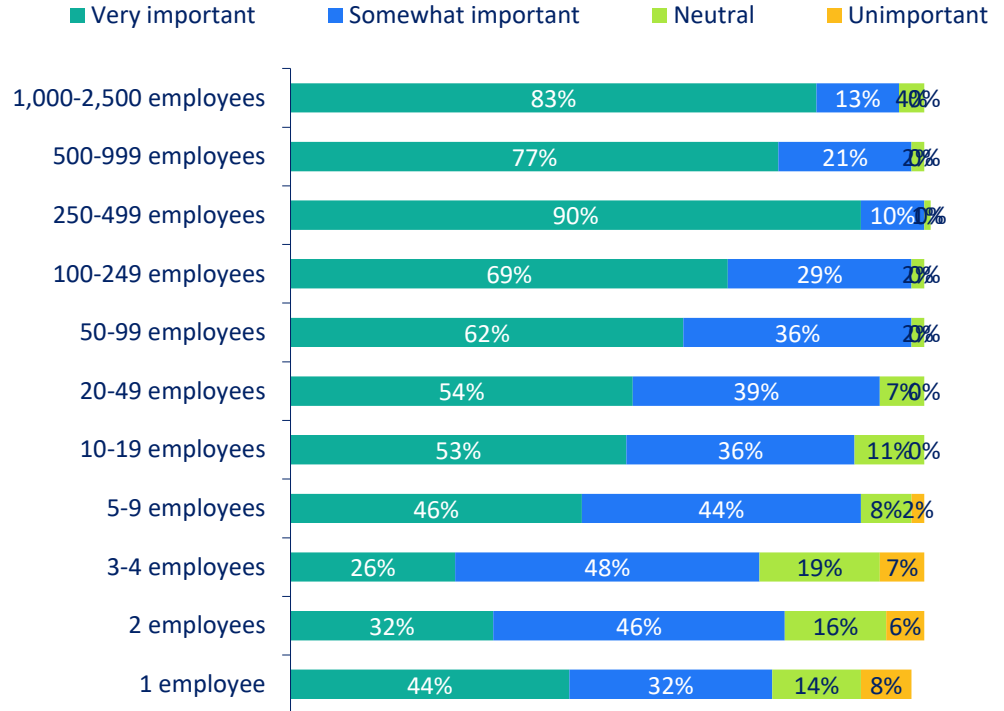
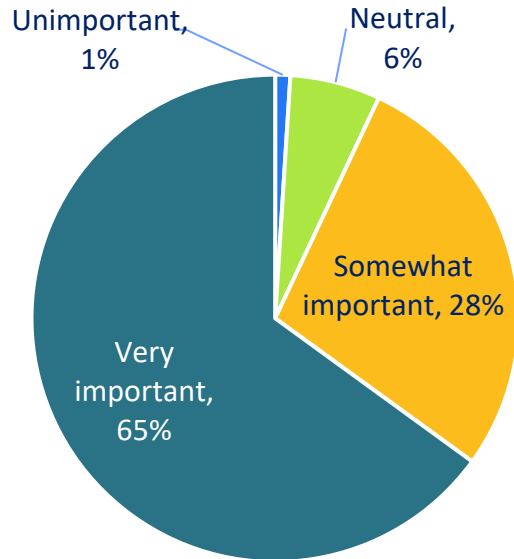


19) How often does your organization re-evaluate its technology stack to consider new solutions or upgrades?, Sample Size = 738

# Technology Decision-Making

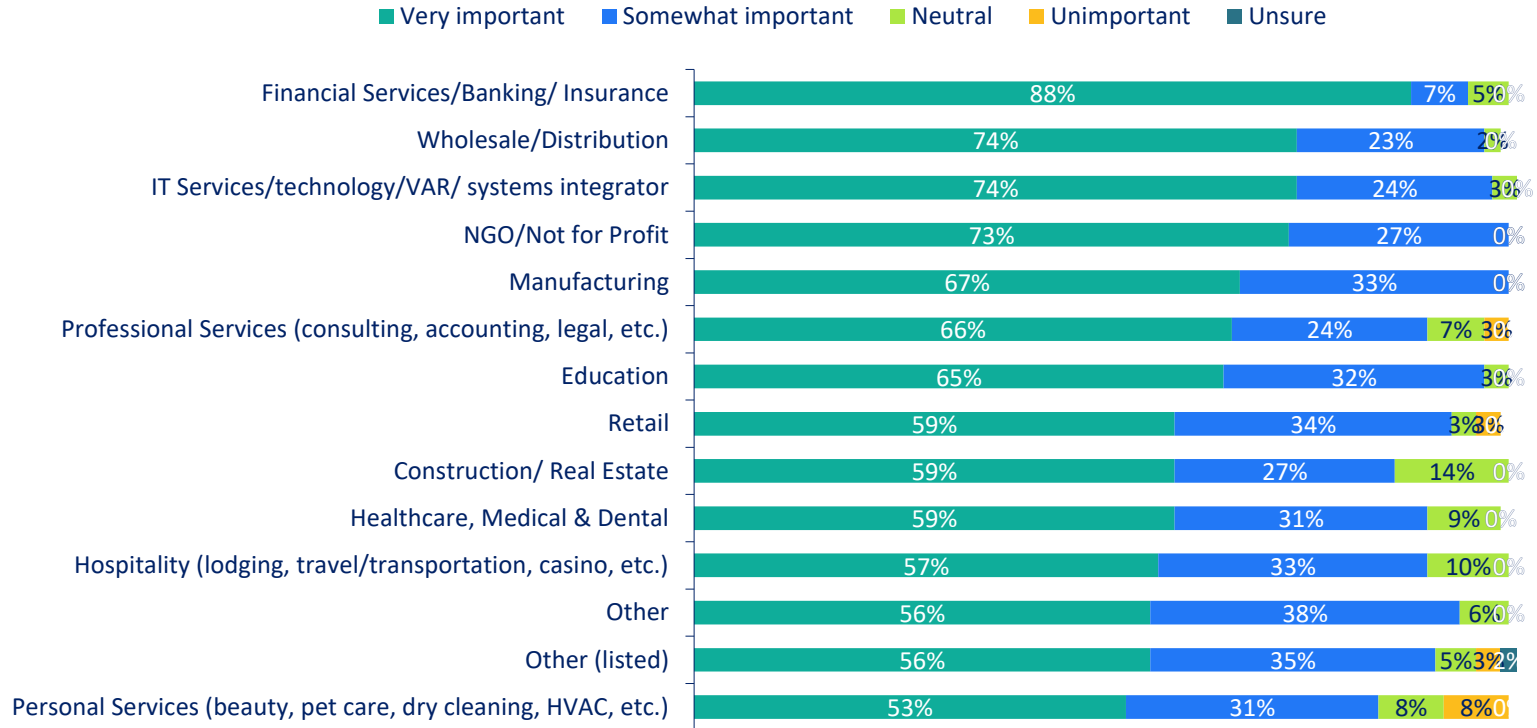


# Importance of Technology in Overall Business Strategy



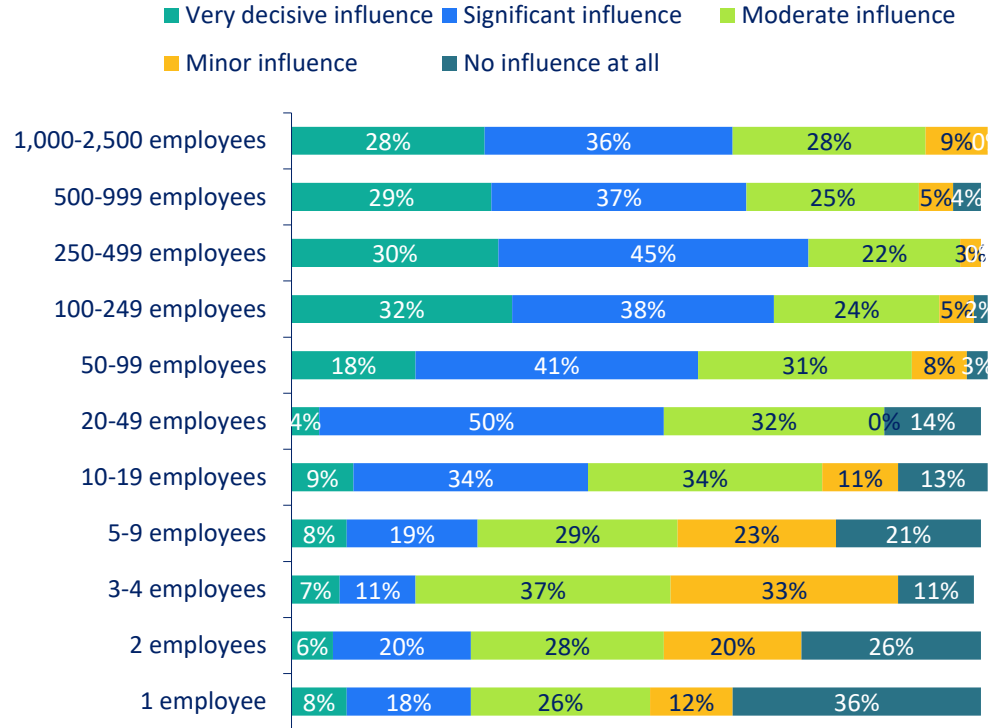
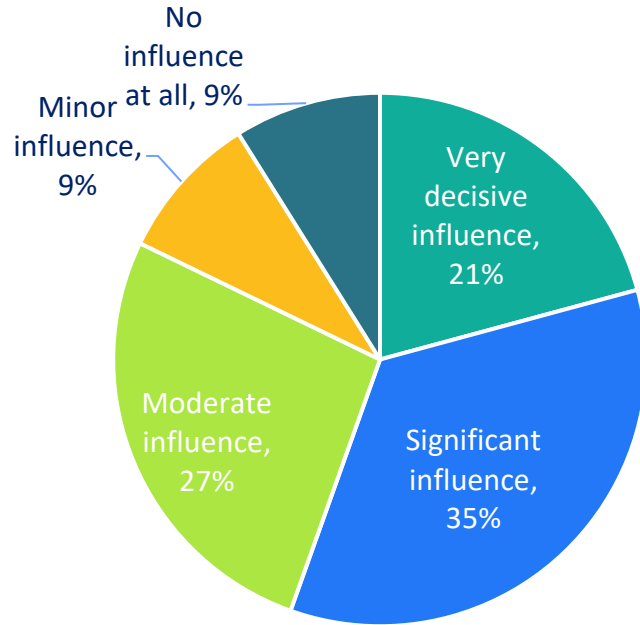
9) Please indicate the importance of technology in your organization's overall business strategy; Sample Size = 738

# Importance of Technology in Overall Business Strategy by Industry



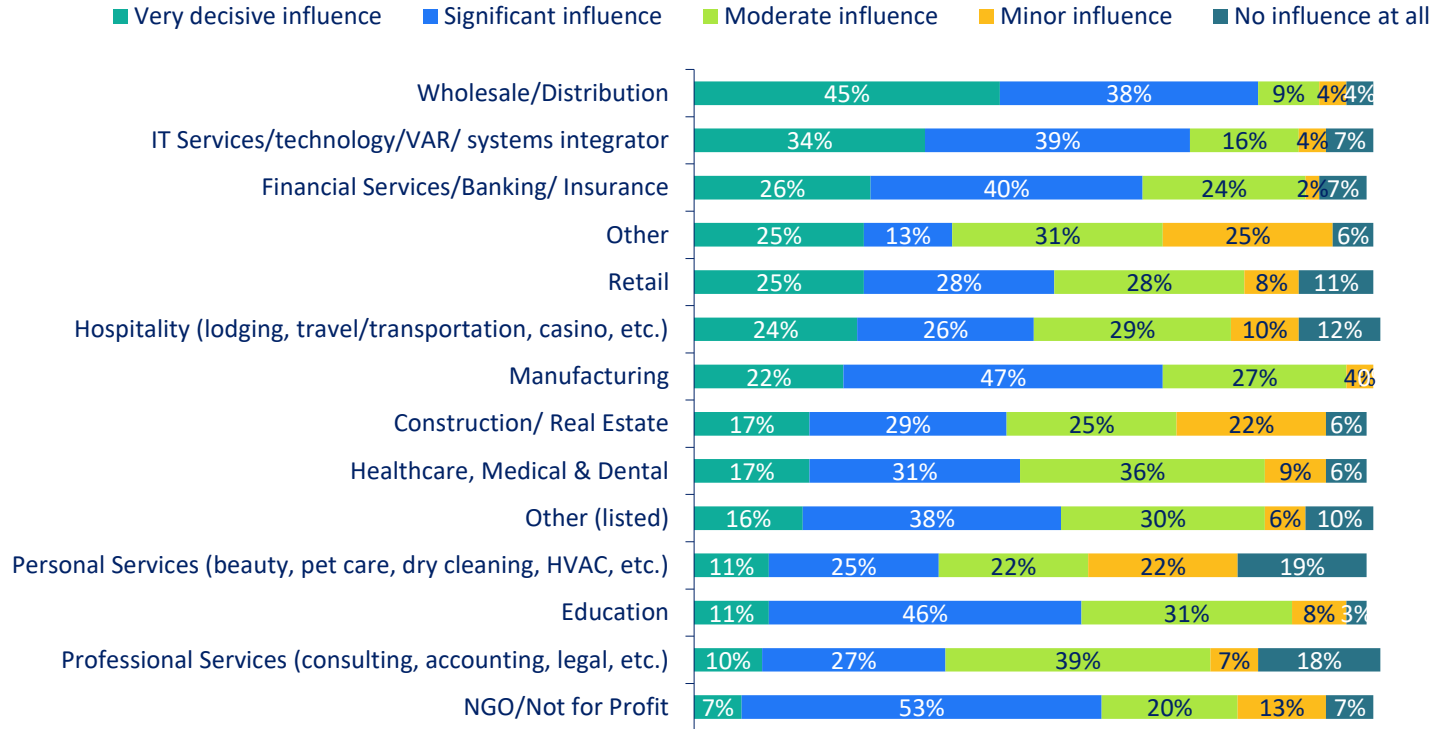
9) Please indicate the importance of technology in your organization's overall business strategy; Sample Size = 738

# Role of Macroeconomic Factors in Technology Investments and Decisions



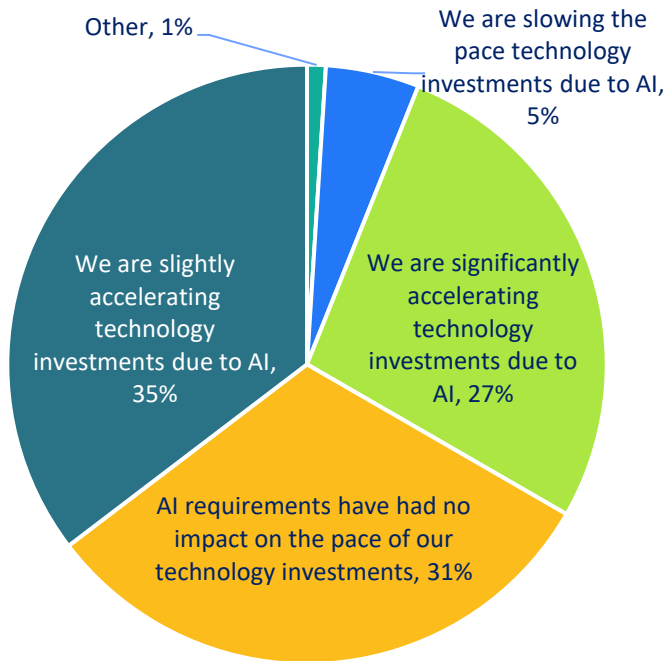
17) What role do macro-economic factors play in influencing your organization's technology investment timing and decisions?, Sample Size = 738

# Role of Macroeconomic Factors in Technology Investments and Decisions by Industry

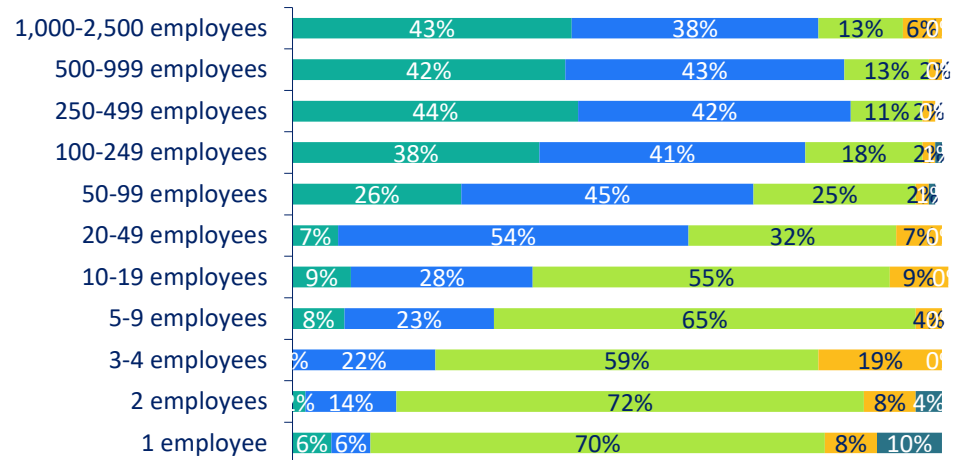


17) What role do macro-economic factors play in influencing your organization's technology investment timing and decisions?, Sample Size = 738

# How AI Requirements Have Influenced the Pace of Technology Investments



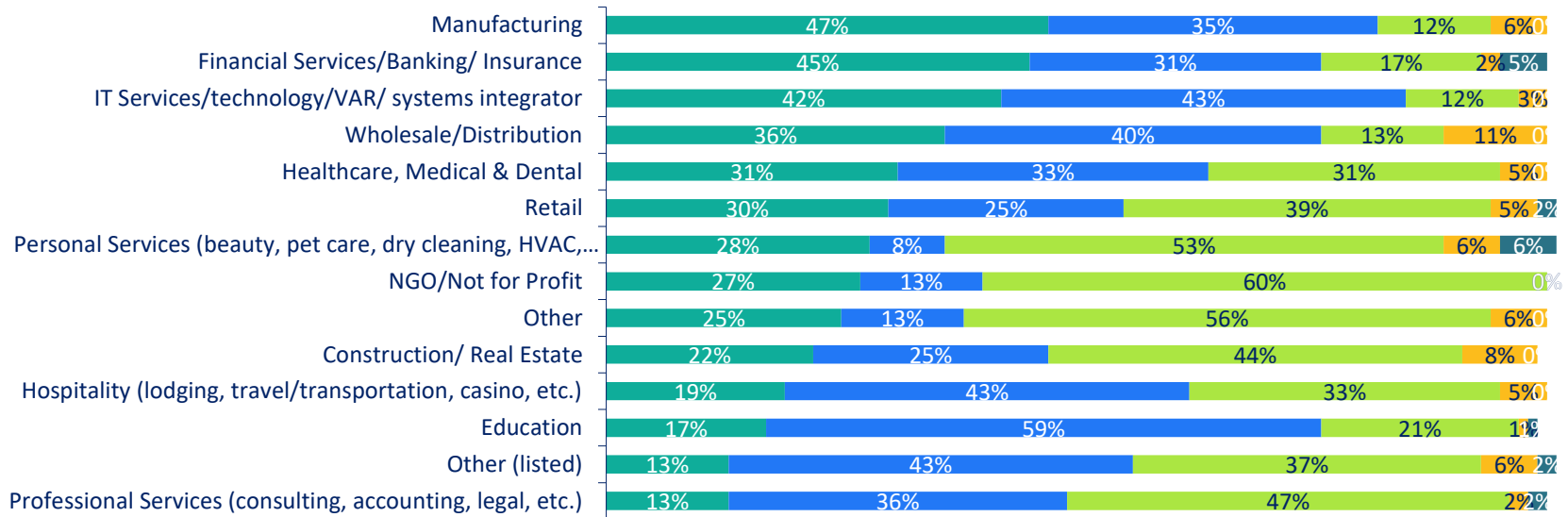
- We are significantly accelerating technology investments due to AI
- We are slightly accelerating technology investments due to AI
- AI requirements have had no impact on the pace of our technology investments
- We are slowing the pace technology investments due to AI
- Other



13) Which of the following statements best reflects how requirements to use artificial intelligence (AI) have influenced the pace of technology investments in your organization?, Sample Size = 738

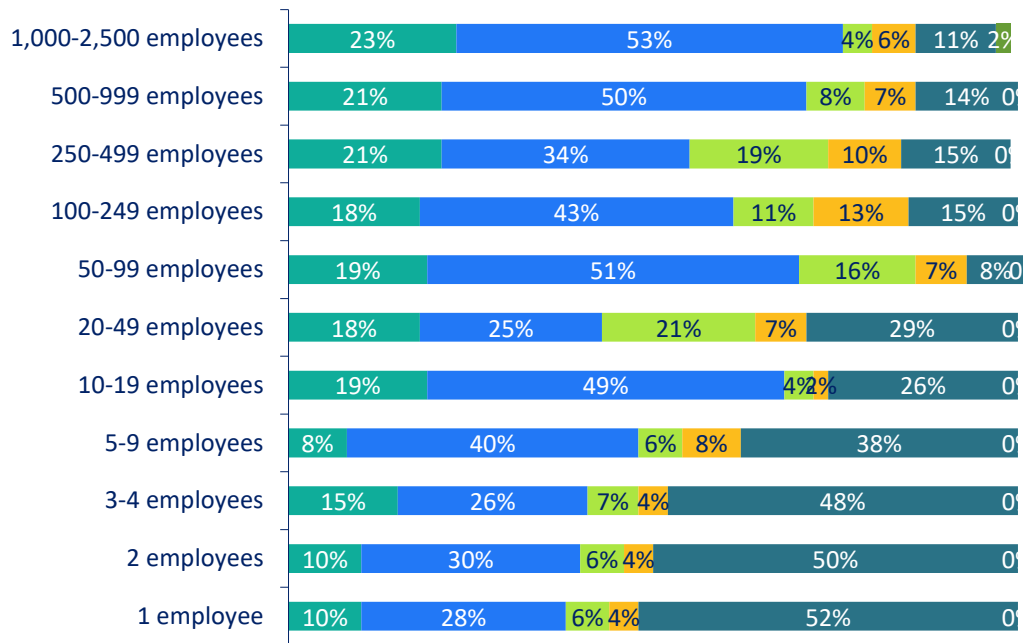
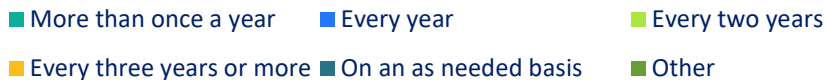
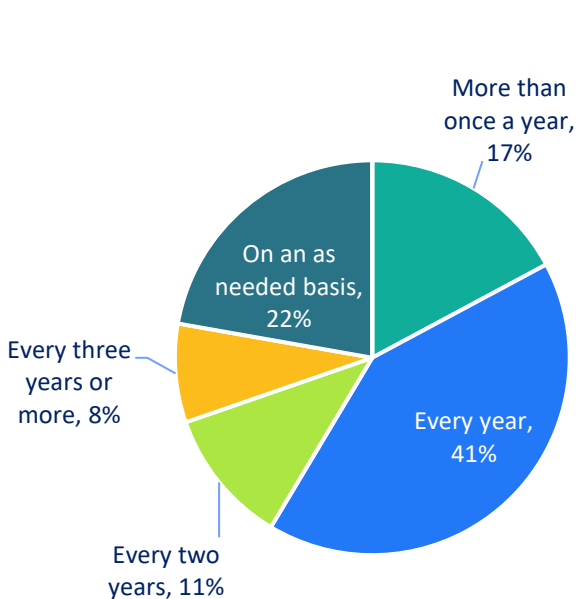
# How AI Requirements Have Influenced the Pace of Technology Investments by Industry

- We are significantly accelerating technology investments due to AI
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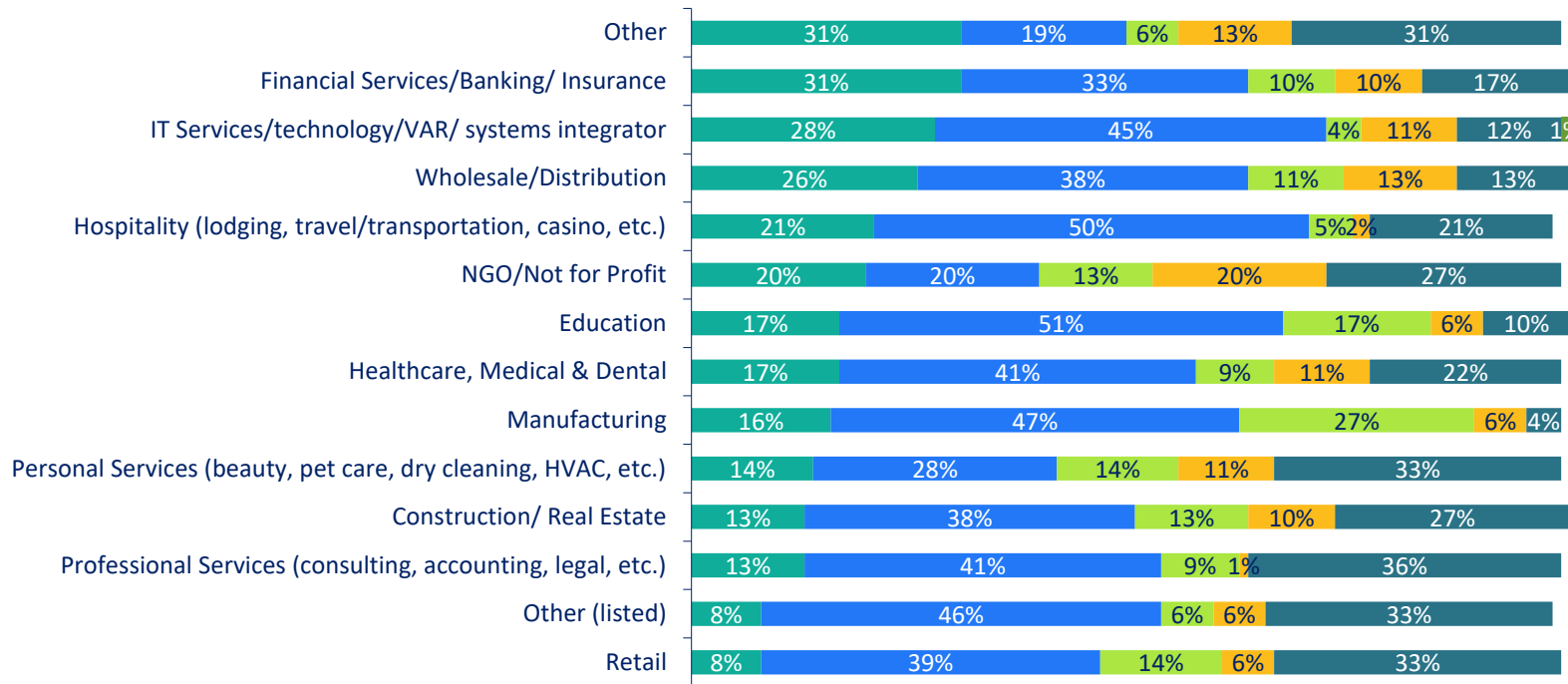
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# How Often SMBs Reevaluate Their Technology Stack/Solutions by Industry

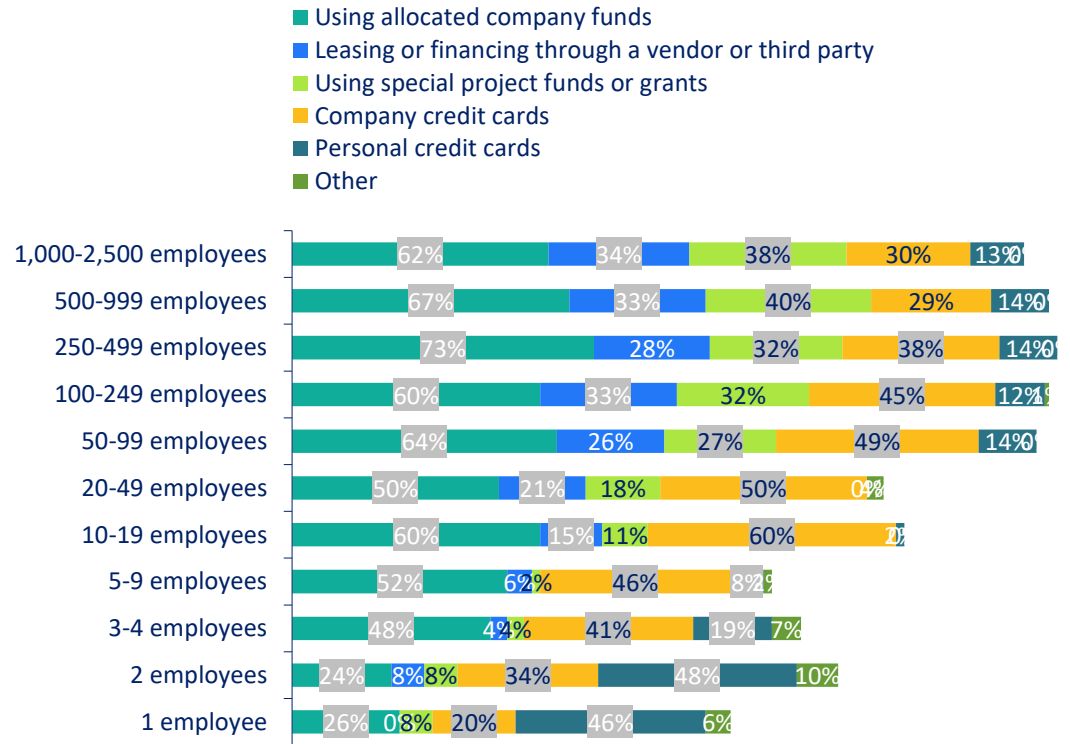
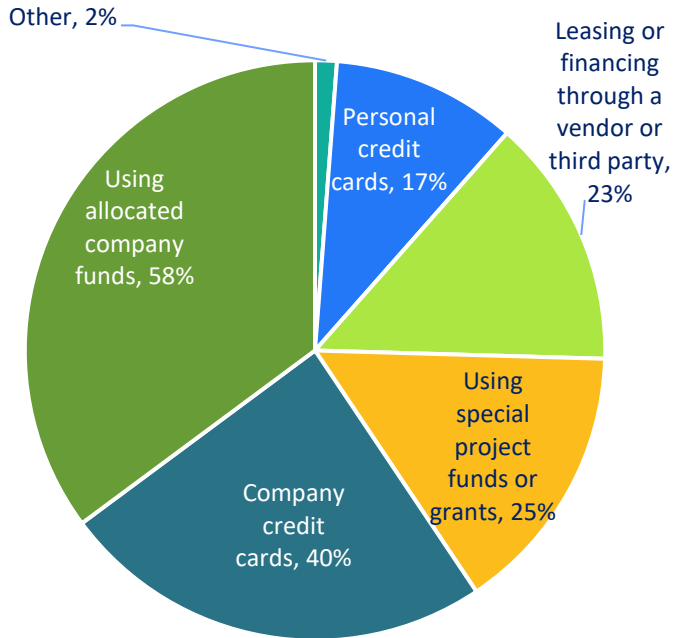
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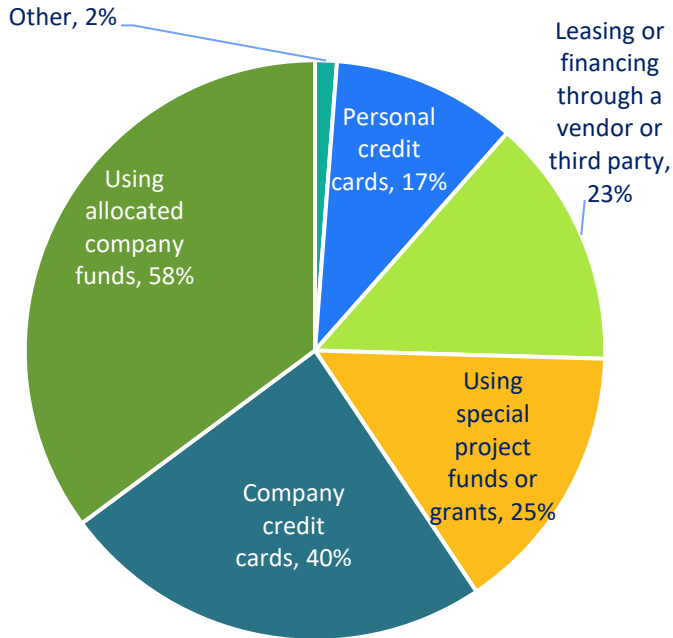


# How SMBs Finance Technology Purchases



20) Which of the following has your organization used to finance technology purchases in the last 2 years?, Sample Size = 738 (Select all that apply)

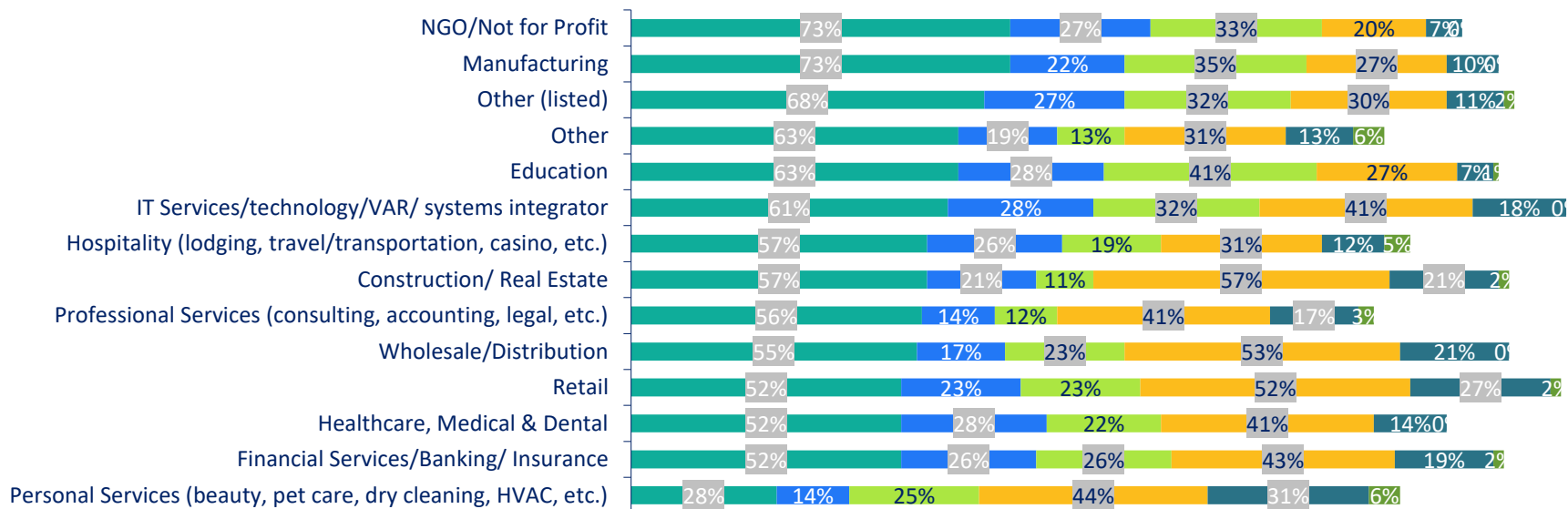
# How SMBs Finance Technology Purchases



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10-19	Allocated Company Funds, Vendor Leasing or Financing (60%)		Vendor Leasing or Financing (15%)
5-9	Allocated Company Funds (52%)	Company Credit Cards (46%)	Other (8%)
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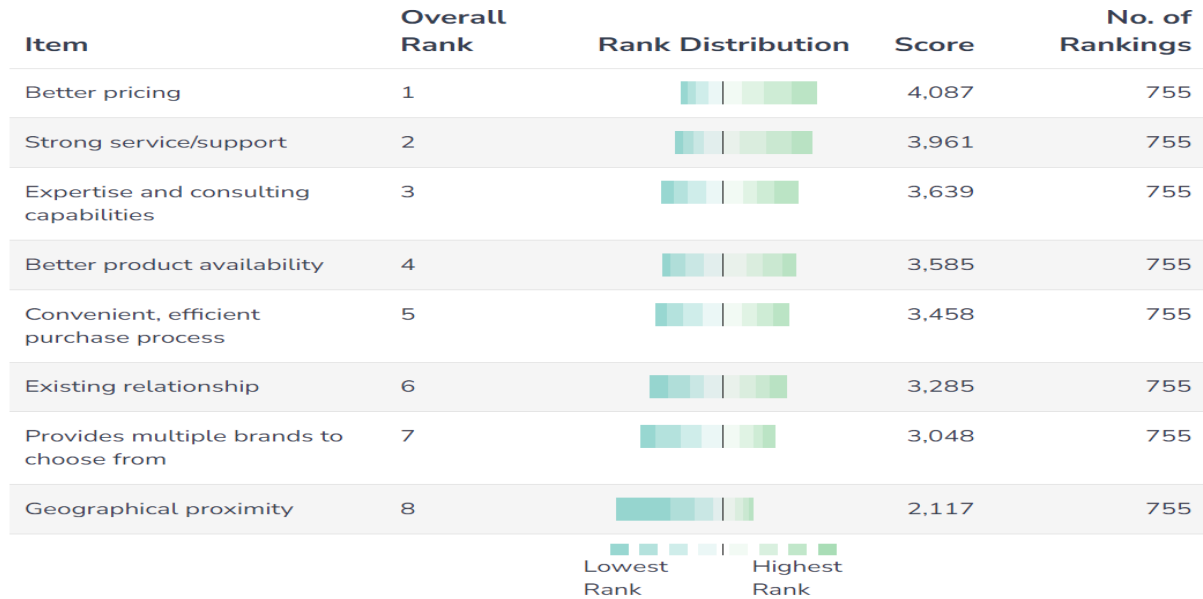
# How SMBs Finance Technology Purchases by Industry



20) Which of the following has your organization used to finance technology purchases in the last 2 years?, Sample Size = 738 (Select all that apply)

# Importance of Different Factors When Choosing a Technology Provider

29. Please rate the importance of the following factors when choosing a technology solutions provider: (Move choices from left to right in order of importance)



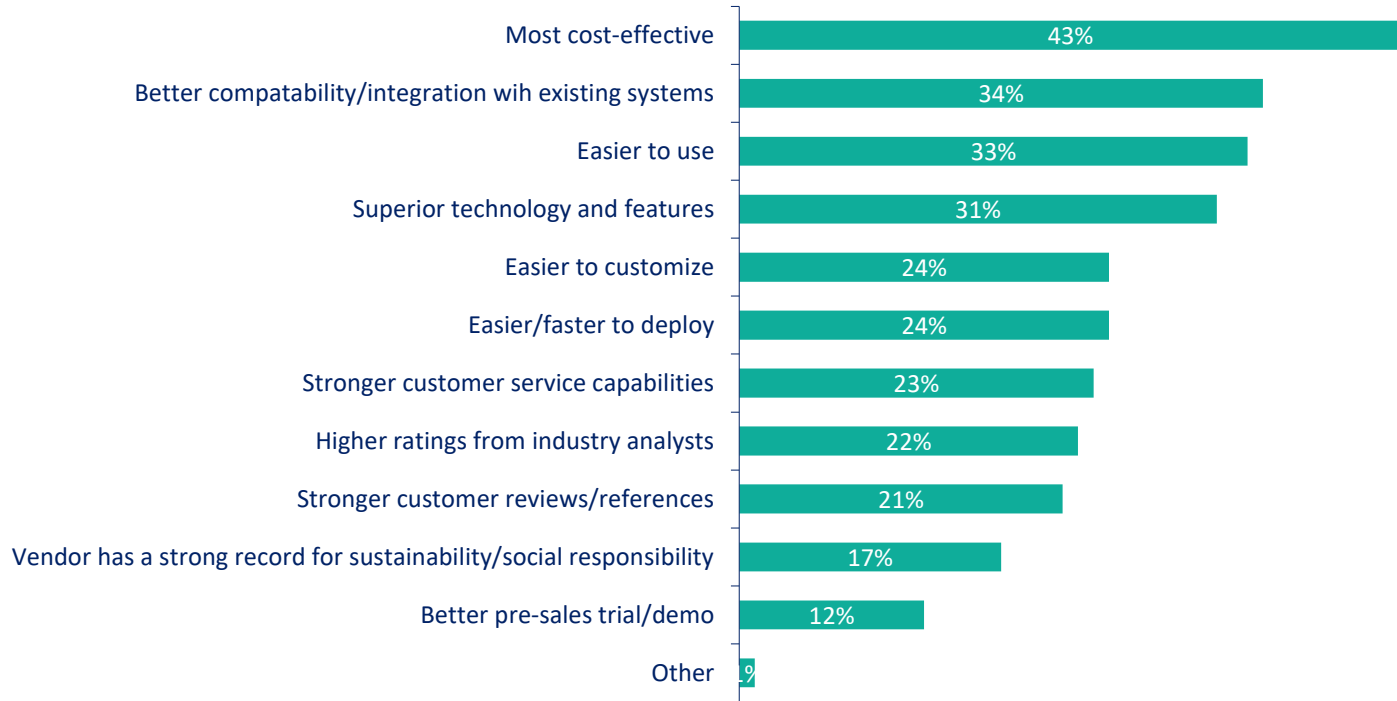
29. Please rate the importance of the following factors when choosing a technology solutions provider: (Select up to 3 responses)

# Minor Shifts In Importance of Different Factors When Choosing a Technology Provider By Size of Company

Top Factors	1-19 empl.	20-49 empl.	50-99 empl.	100-499 empl.	500-999 empl.	1,000-2,000 empl.
1	Better pricing	Strong service/support	Strong service/support	Strong service/support	Strong service/support	Strong service/support
2	Strong service/support	Better pricing	Better pricing	Better pricing	Better pricing	Better pricing
3	Expertise and consulting capabilities	Better product availability	Better product availability	Expertise and consulting capabilities	Better product availability	Better product availability
4	Better product availability	Expertise and consulting capabilities	Convenient, efficient purchase process	Convenient, efficient purchase process	Expertise and consulting capabilities	Expertise and consulting capabilities
5	Existing relationship	Existing relationship	Expertise and consulting capabilities	Better product availability	Convenient, efficient purchase process	Convenient, efficient purchase process
6	Convenient, efficient purchase process	Convenient, efficient purchase process	Existing relationship	Existing relationship	Existing relationship	Existing relationship
7	Provides multiple brands to choose from	Provides multiple brands to choose from	Provides multiple brands to choose from	Provides multiple brands to choose from	Provides multiple brands to choose from	Provides multiple brands to choose from
8	Geographical proximity	Geographical proximity	Geographical proximity	Geographical proximity	Geographical proximity	Geographical proximity

29. Please rate the importance of the following factors when choosing a technology solutions provider: (Select up to 3 responses)

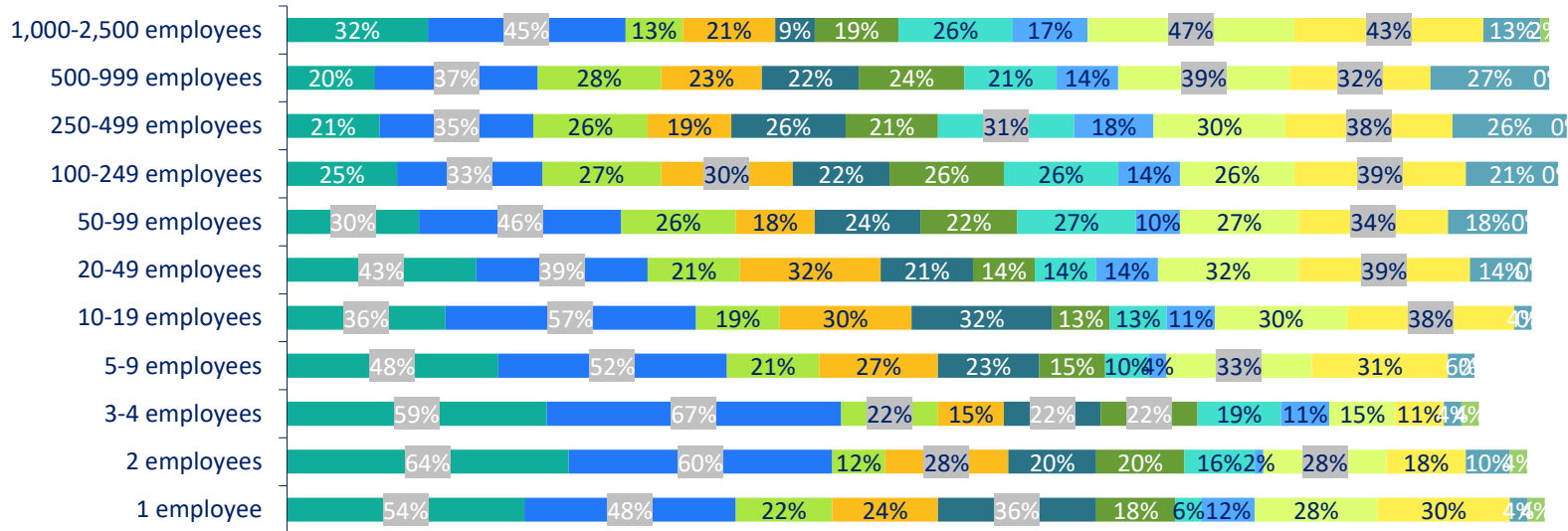
# Top Reasons Solutions Get to a “Short List”



27) What are the top reasons a specific solution typically gets to your organization's "short list" over competing solutions?, Sample Size = 738  
(Select up to 3 responses)

# Top Reasons Solutions Get to a "Short List" by Employee Size

- Easier to use
- Most cost-effective
- Stronger customer service capabilities
- Easier/faster to deploy
- Easier to customize
- Stronger customer reviews/references
- Higher ratings from industry analysts
- Better pre-sales trial/demo
- Superior technology and features
- Better compatibility/integration with existing systems
- Vendor has a strong record for sustainability/social responsibility
- Other



27) What are the top reasons a specific solution typically gets to your organization's "short list" over competing solutions?, Sample Size = 738 (Select up to 3 responses)

# Top Reasons Solutions Get to a “Short List” by Employee Size

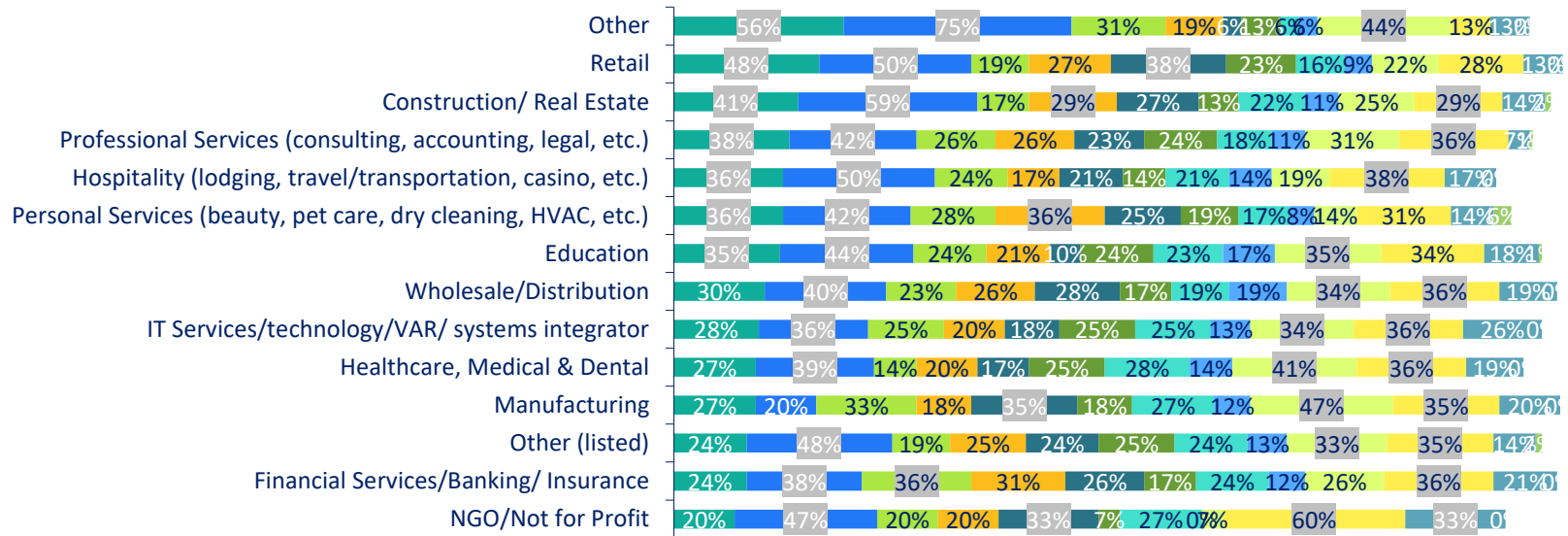
Employee Size	#1 Reason	#2 Reason	#3 Reason
1,000-2,500	Superior Technology and Features (47%)	More Cost-Effective (45%)	Better Compatibility / Integration (43%)
500-999	Superior Technology and Features (39%)	More Cost-Effective (37%)	Better Compatibility / Integration (32%)
250-499	Better Compatibility / Integration (38%)	More Cost-Effective (35%)	Higher Ratings (31%)
100-249	Better Compatibility / Integration (39%)	More Cost-Effective (33%)	Easier/Faster to Deploy (30%)
50-99	More Cost-Effective (46%)	Better Compatibility / Integration (34%)	Easier to Use (30%)
20-49	Easier to Use (43%)	Better Compatibility / Integration, More Cost-Effective (39%)	
10-19	More Cost-Effective (57%)	Better Compatibility / Integration (38%)	Easier to Use (36%)
5-9	More Cost-Effective (52%)	Easier to Use (48%)	Superior Technology and Features (33%)
3-4	More Cost-Effective (67%)	Easier to Use (59%)	Customer Service, Easier to Customize, Customer Reviews (22%)
2	Easier to Use (64%)	More Cost-Effective (60%)	Easier/Faster to Deploy, Superior Technology and Features (28%)
1	Easier to Use (54%)	More Cost-Effective (48%)	Easier to Customize (36%)

27) What are the top reasons a specific solution typically gets to your organization's "short list" over competing solutions?, Sample Size = 738 (Select up to 3 responses)



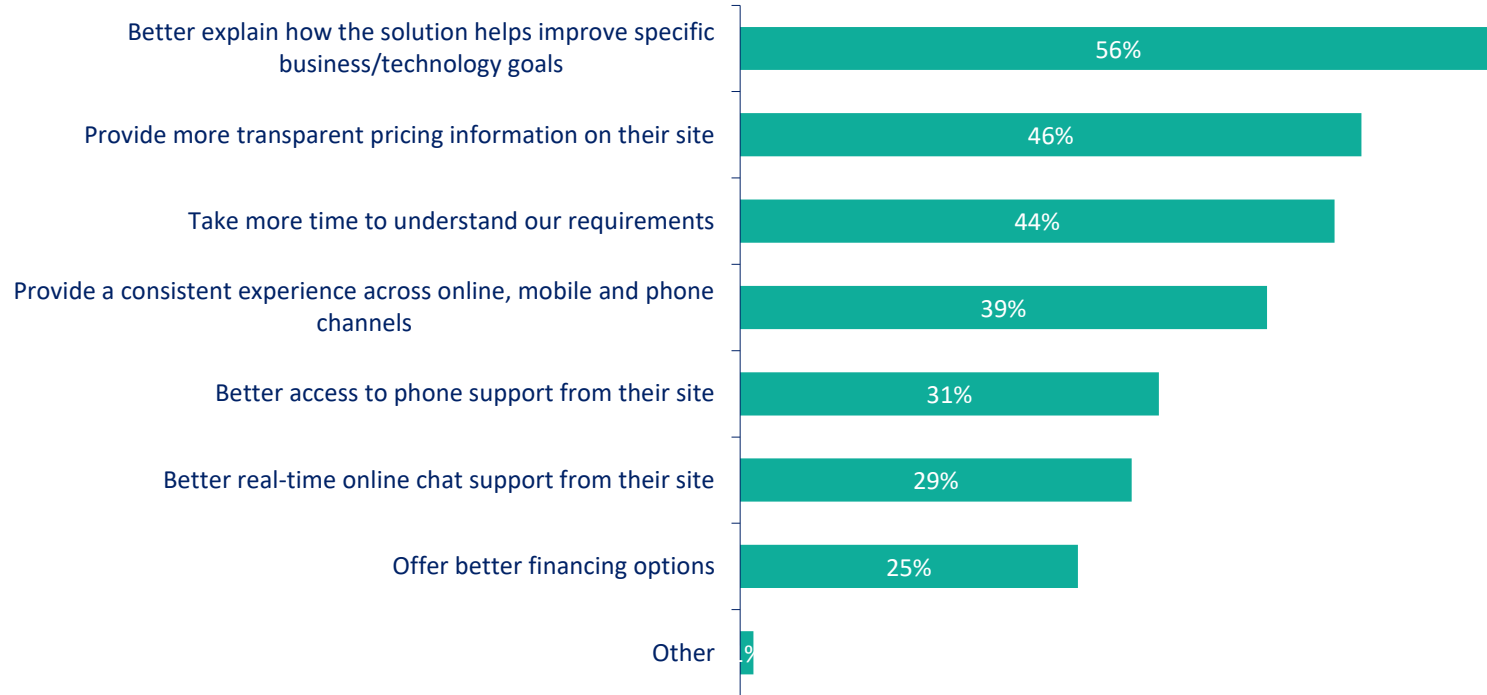
# Top Reasons Solutions Get to a "Short List" by Industry

- Easier to use
- Stronger customer service capabilities
- Easier to customize
- Higher ratings from industry analysts
- Superior technology and features
- Vendor has a strong record for sustainability/social responsibility
- Most cost-effective
- Easier/faster to deploy
- Stronger customer reviews/references
- Better pre-sales trial/demo
- Better compatibility/integration with existing systems
- Other



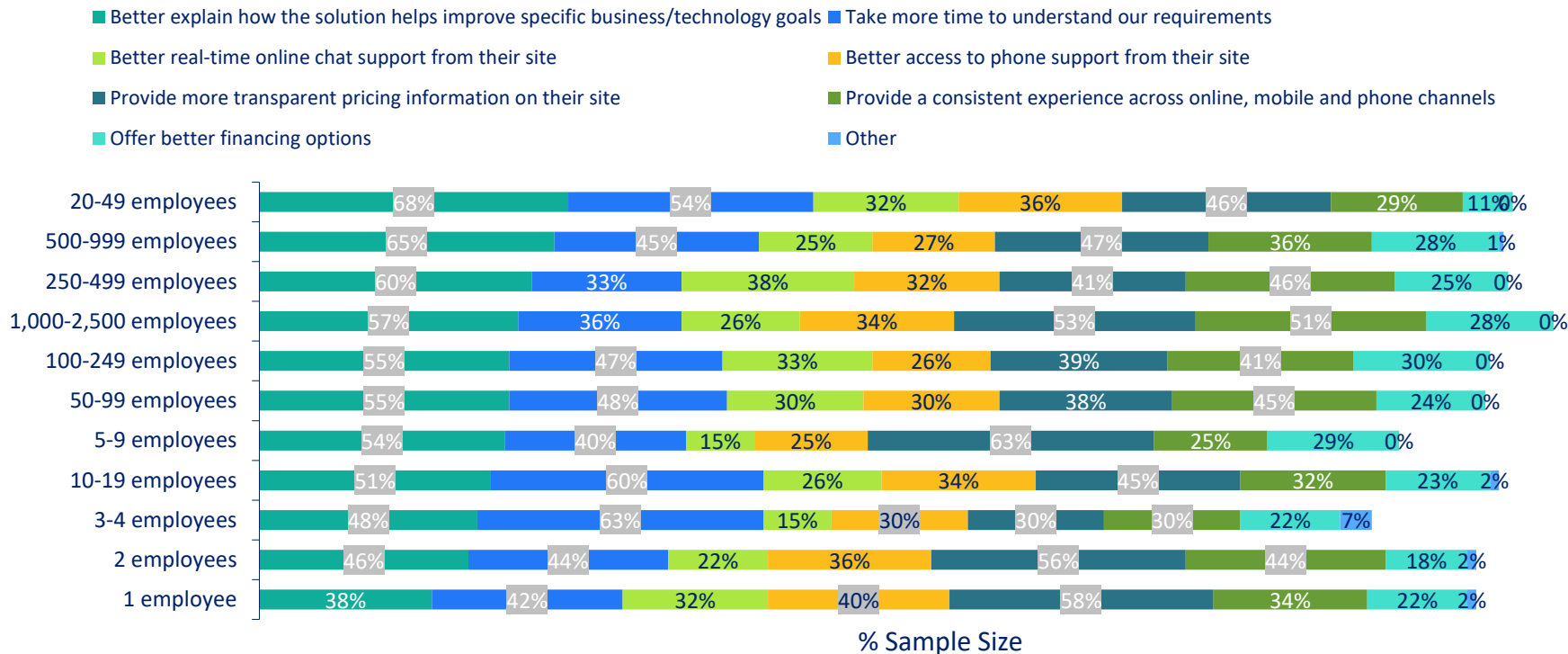
27) What are the top reasons a specific solution typically gets to your organization's "short list" over competing solutions?, Sample Size = 738 (Select up to 3 responses)

# Top Ways Vendors Improve the Purchasing Experience



28) What are the top ways vendors can improve the purchasing experience?, Sample Size = 738 (Select up to 3 responses)

# Top Ways Vendors Can Improve the Purchasing Experience by Employee Size



28) What are the top ways vendors can improve the purchasing experience? Always, Sample Size = 738 (Select up to 3 responses)

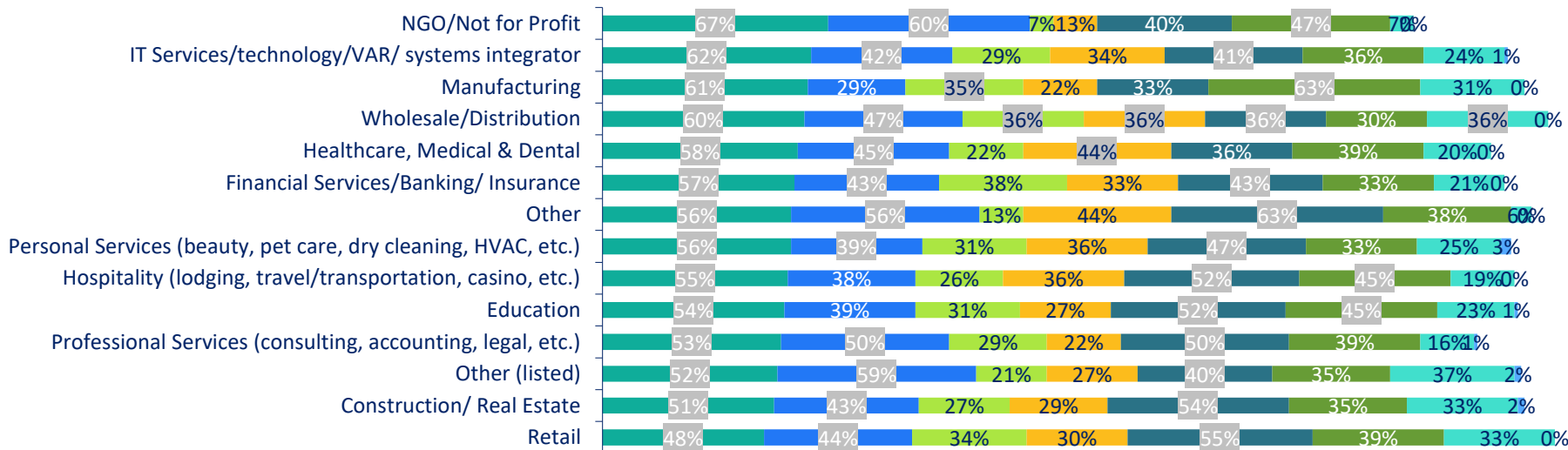
# Top Ways Vendors Can Improve the Purchasing Experience by Employee Size

Employee Size	#1 Way to Improve	#2 Way to Improve	#3 Way to Improve
1,000-2,500	Better Explain how Solution Improves Specific Business/Technology Goals (57%)	Provide more transparent pricing information on their site (53%)	Provide a consistent experience across online, mobile, and phone platforms (51%)
500-999	Better Explain how Solution Improves Specific Business/Technology Goals (65%)	Provide more transparent pricing information on their site (47%)	Take more time to understand our requirements (45%)
250-499	Better Explain how Solution Improves Specific Business/Technology Goals (60%)	Provide a consistent experience across online, mobile, and phone platforms (46%)	Provide more transparent pricing information on their site (41%)
100-249	Better Explain how Solution Improves Specific Business/Technology Goals (57%)	Take more time to understand our requirements (47%)	Provide a consistent experience across online, mobile, and phone platforms (41%)
50-99	Better Explain how Solution Improves Specific Business/Technology Goals (55%)	Take more time to understand our requirements (48%)	Provide a consistent experience across online, mobile, and phone platforms (45%)
20-49	Better Explain how Solution Improves Specific Business/Technology Goals (68%)	Take more time to understand our requirements (54%)	Provide more transparent pricing information on their site (46%)
10-19	Take more time to understand our requirements (60%)	Better Explain how Solution Improves Specific Business/Technology Goals (51%)	Provide more transparent pricing information on their site (45%)
5-9	Provide more transparent pricing information on their site (63%)	Better Explain how Solution Improves Specific Business/Technology Goals (54%)	Take more time to understand our requirements (40%)
3-4	Take more time to understand our requirements (63%)	Better Explain how Solution Improves Specific Business/Technology Goals (48%)	Better access to phone support from their site, Provide more transparent pricing information on their site, Provide a consistent experience across online, mobile, and phone platforms (30%),
2	Provide more transparent pricing information on their site (56%)	Better Explain how Solution Improves Specific Business/Technology Goals (46%)	Take more time to understand our requirements, Provide a consistent experience across online, mobile, and phone platforms (44%)
1	Provide more transparent pricing information on their site (58%)	Take more time to understand our requirements (42%)	Better access to phone support from their site (40%)

28) What are the top ways vendors can improve the purchasing experience? Always, Sample Size = 738 (Select up to 3 responses)

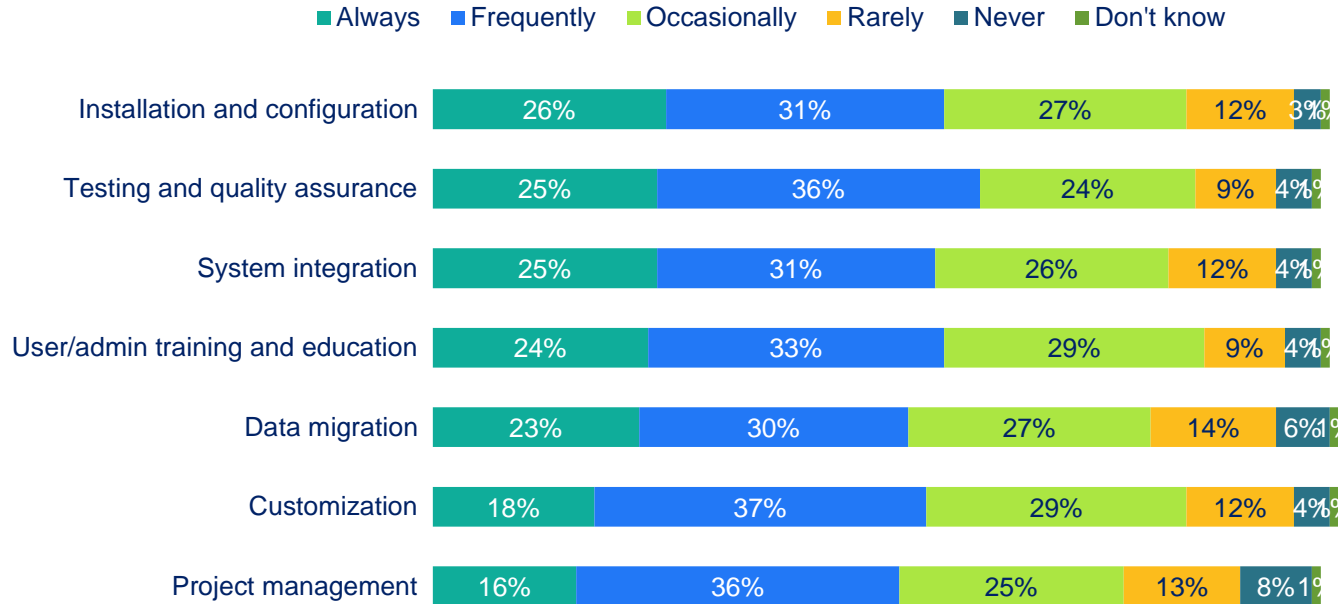
# Top Ways Vendors Improve the Purchasing Experience by Industry

- Better explain how the solution helps improve specific business/technology goals
- Take more time to understand our requirements
- Better real-time online chat support from their site
- Better access to phone support from their site
- Provide more transparent pricing information on their site
- Provide a consistent experience across online, mobile and phone channels
- Offer better financing options
- Other



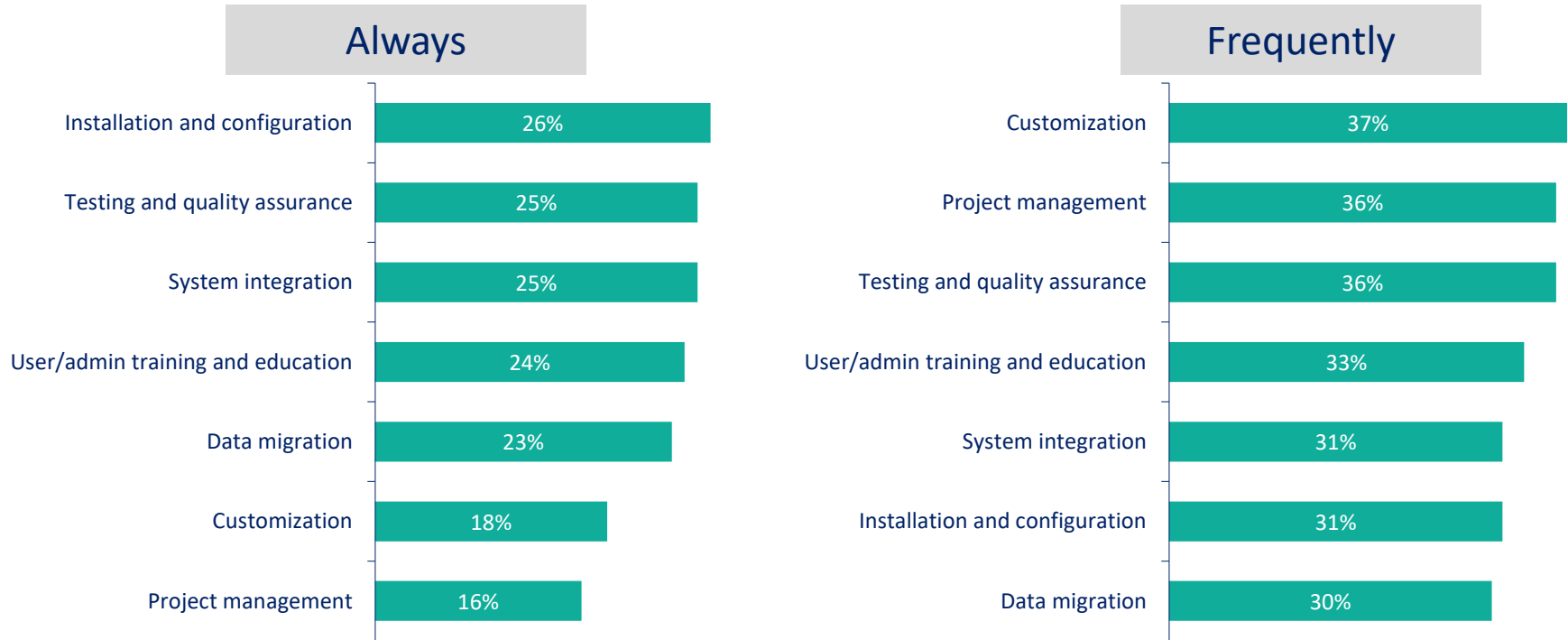
28) What are the top ways vendors can improve the purchasing experience?, Sample Size = 738 (Select up to 3 responses)

# Frequency of SMBs Needing Different Services When Buying a New Technology Solution



30) How frequently does your organization require the following types of services from technology vendors when purchasing a new solution?, Sample Size = 738

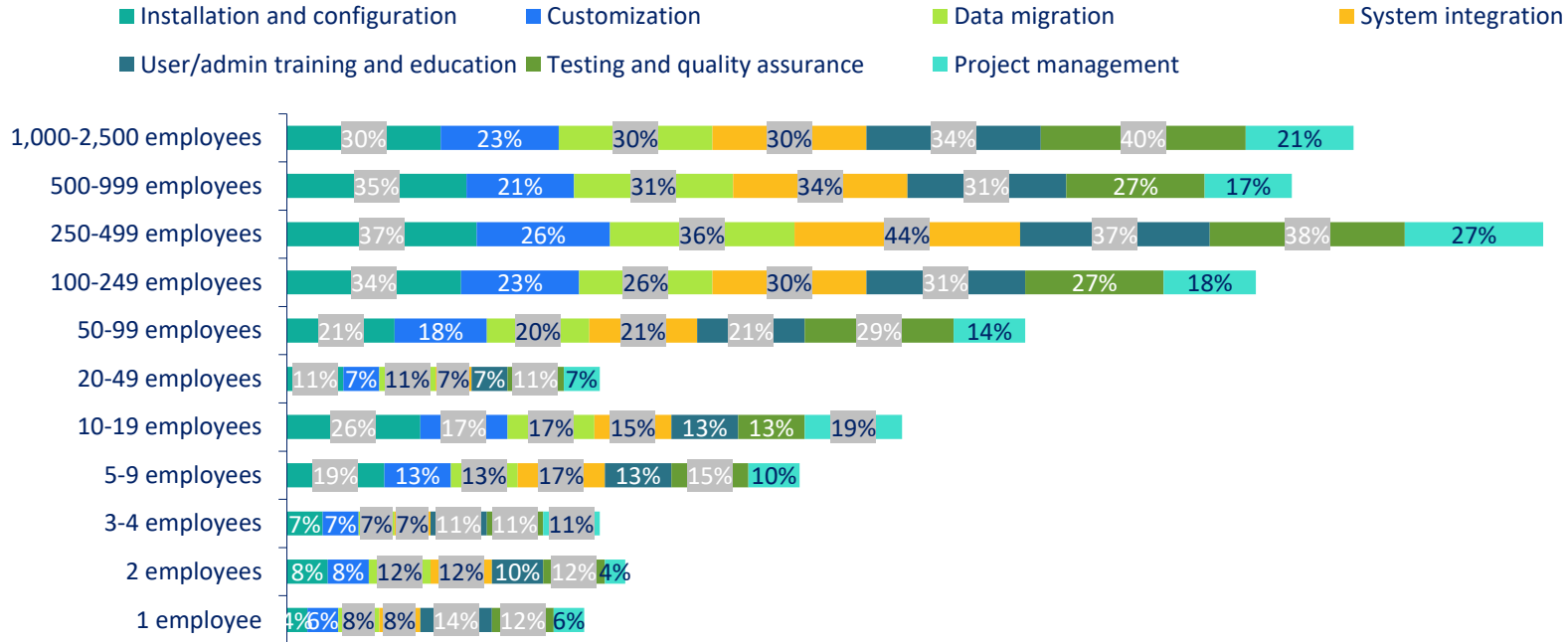
# “Always” and “Frequently” Required Services When Buying a New Technology Solution



30) How frequently does your organization require the following types of services from technology vendors when purchasing a new solution? Always, Sample Size = 738

# “Always” Required Services When Buying a New Technology Solution by Employee Size

## Always

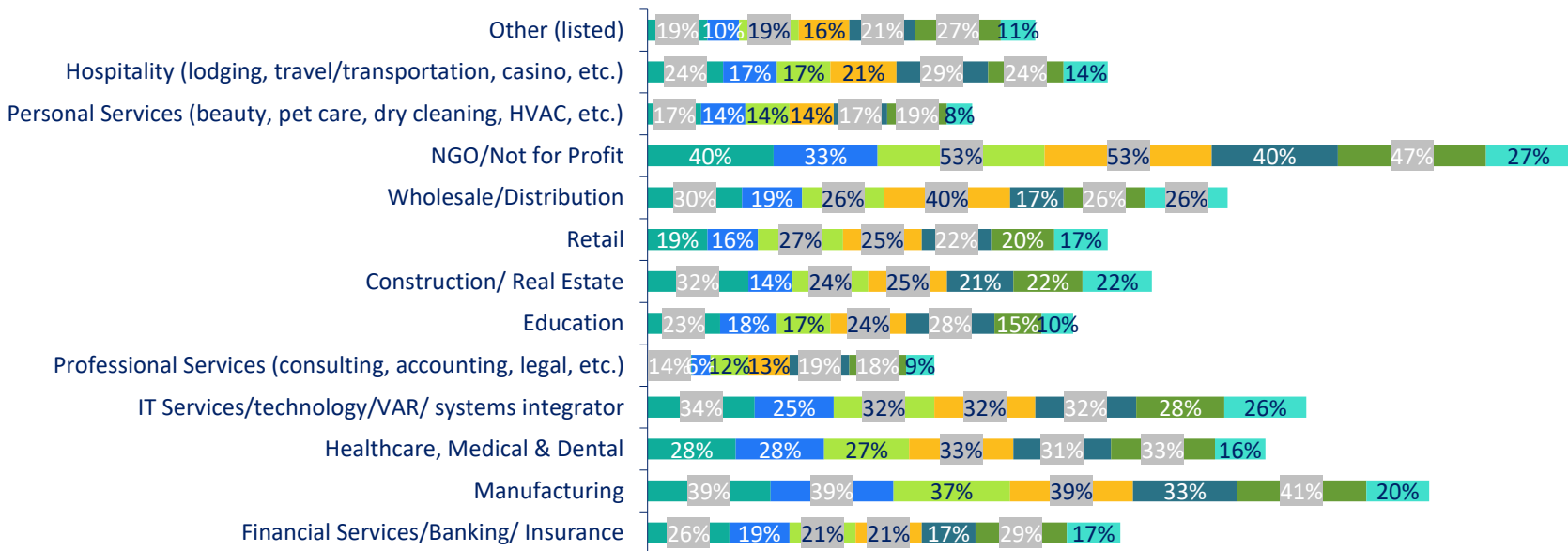


30) How frequently does your organization require the following types of services from technology vendors when purchasing a new solution? Always Sample Size = 738



# “Always” Required Services When Buying a New Technology Solution by Industry

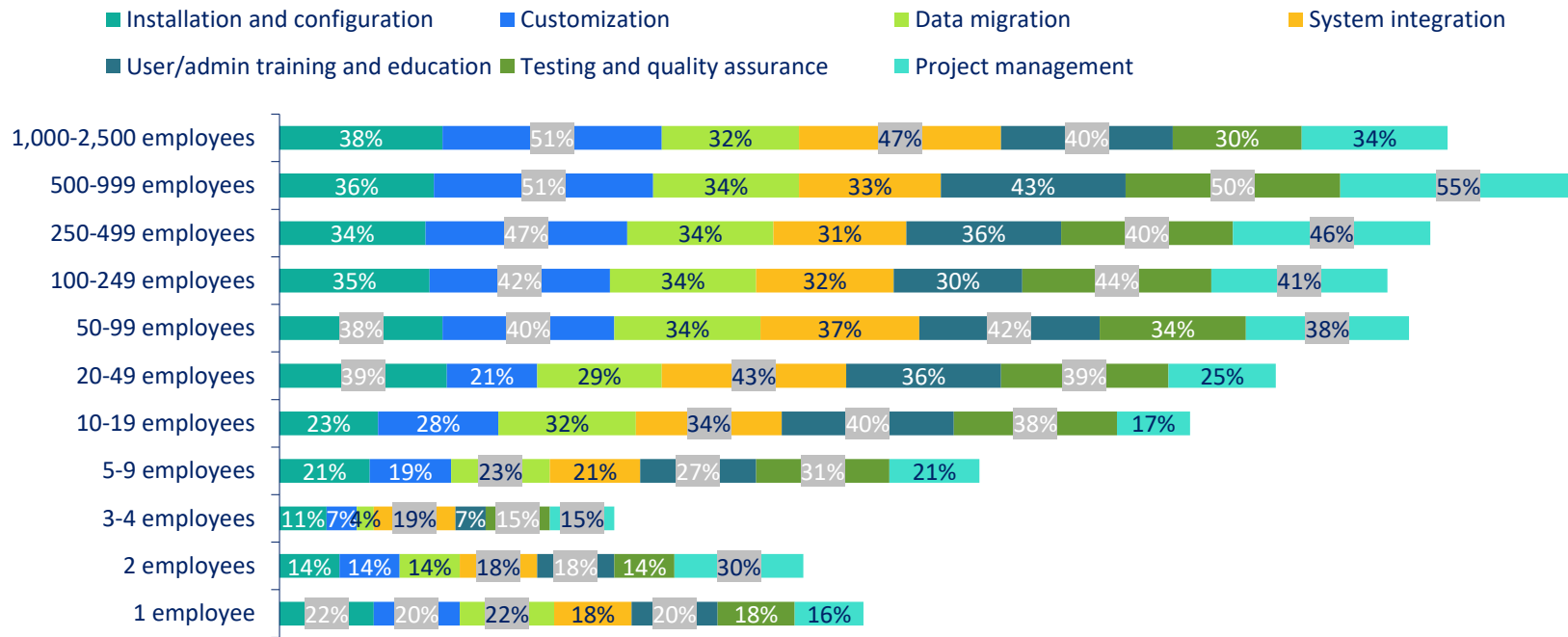
## Always



30) How frequently does your organization require the following types of services from technology vendors when purchasing a new solution? Always, Sample Size = 738

# “Frequently” Required Services When Buying a New Technology Solution by Employee Size

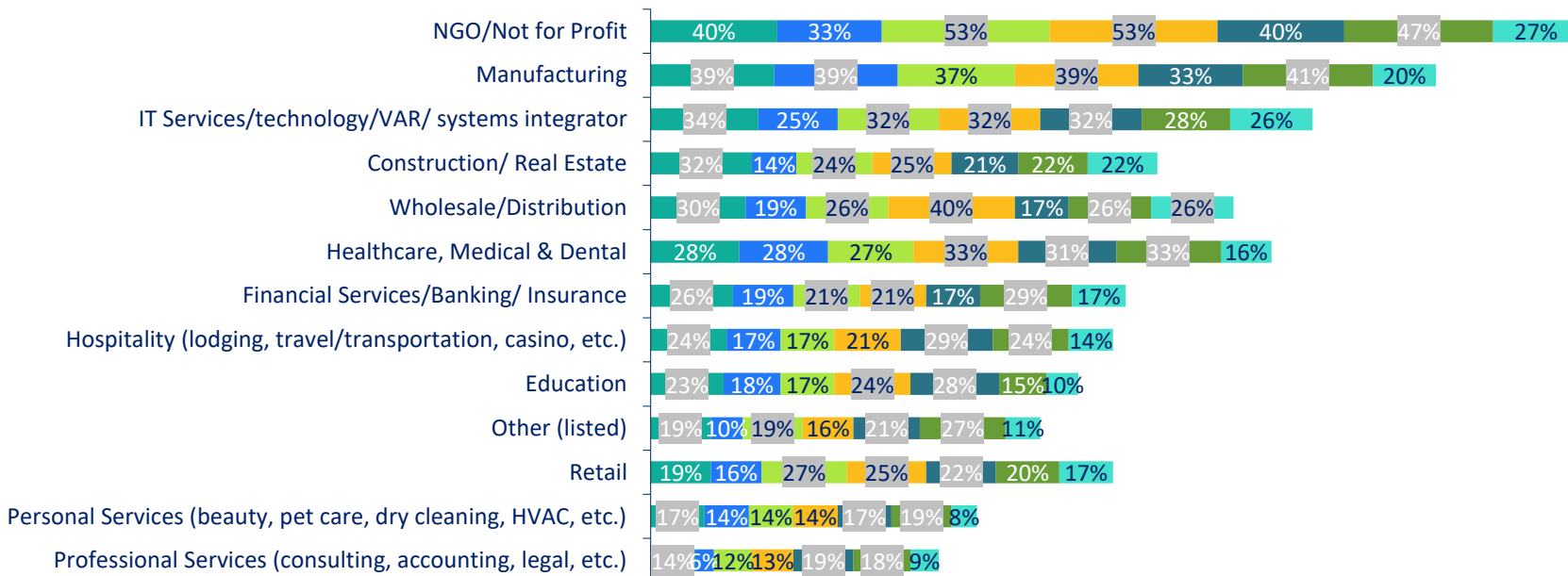
## Frequently



30) How frequently does your organization require the following types of services from technology vendors when purchasing a new solution? Frequently Sample Size = 738

# “Frequently” Required Services When Buying a New Technology Solution by Industry

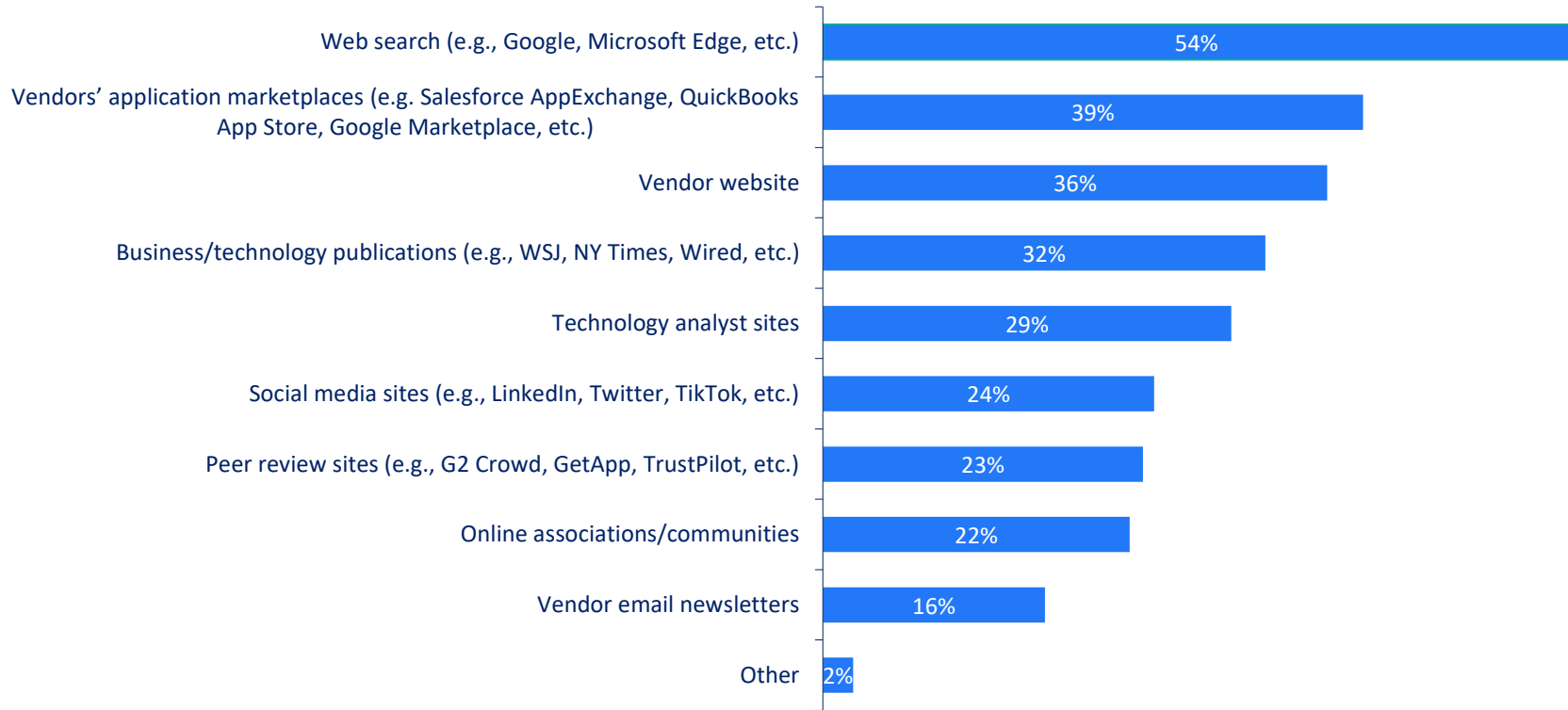
## Frequently



30) How frequently does your organization require the following types of services from technology vendors when purchasing a new solution? Frequently, Sample Size = 738

# Information and Guidance Sources and Preferences for Technology Decisions

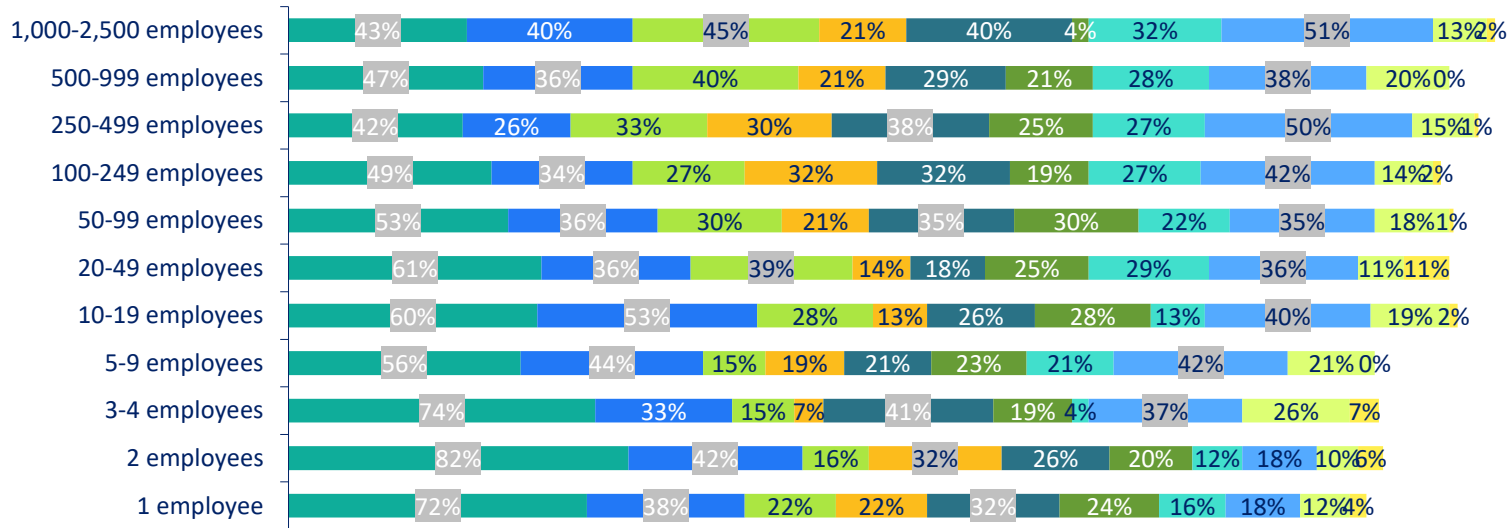
# Information Sources for Learning About New Technology Solutions



21) What online information sources do you visit most often to learn about new technology solutions and trends?, Sample Size = 738

# Top Information Sources for Learning About New Technology Solutions by Employee Size

- Web search (e.g., Google, Microsoft Edge, etc.)
- Technology analyst sites
- Business/technology publications (e.g., WSJ, NY Times, Wired, etc.)
- Peer review sites (e.g., G2 Crowd, GetApp, TrustPilot, etc.)
- Vendor email newsletters
- Vendor website
- Social media sites (e.g., LinkedIn, Twitter, TikTok, etc.)
- Online associations/communities
- Vendors' application marketplaces
- Other



21) What online information sources do you visit most often to learn about new technology solutions and trends?, Sample Size = 738 (Select up to 3 responses)

# Top Information Sources for Learning About New Technology Solutions by Employee Size

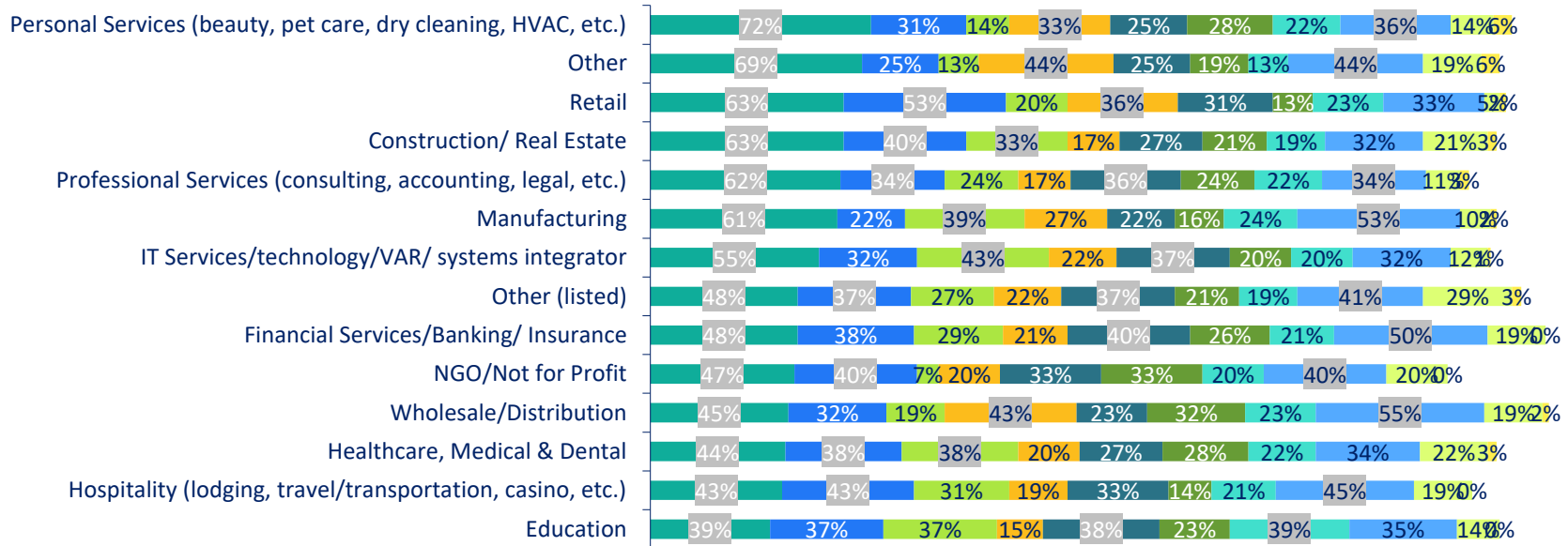


Employee Size	#1 Information Source	#2 Information Source	#3 Information Source
1,000-2,500	Vendors' Application Marketplaces (51%)	Technology Analyst Sites (45%)	Web Search (43%)
500-999	Web Search (47%)	Vendors' Application Marketplaces (38%)	Vendor Website (36%)
250-499	Vendors' Application Marketplaces (50%)	Web Search (42%)	Business/Technology Publications (38%)
100-249	Web Search (49%)	Vendors' Application Marketplaces (42%)	Vendor Website (34%)
50-99	Web Search (53%)	Vendor Website (36%)	Business/Technology Publications, Vendors' Application Marketplaces (35%)
20-49	Web Search (61%)	Technology Analyst Sites (39%)	Vendors' Application Marketplaces, Vendor Website (36%)
10-19	Web Search (60%)	Vendor Website (53%)	Vendors' Application Marketplaces (40%)
5-9	Web Search (56%)	Vendor Website (44%)	Vendors' Application Marketplaces (42%)
3-4	Web Search (74%)	Business/Technology Publications(41%)	Vendors' Application Marketplaces (37%)
2	Web Search (82%)	Vendor Website (42%)	Social Media (32%)
1	Web Search (78%)	Vendor Website (38%)	Business/Technology Publications, Vendors' Application Marketplaces (32%)

21) What online information sources do you visit most often to learn about new technology solutions and trends?, Sample Size = 738 (Select up to 3 responses)

# Top Information Sources for Learning About New Technology Solutions by Industry

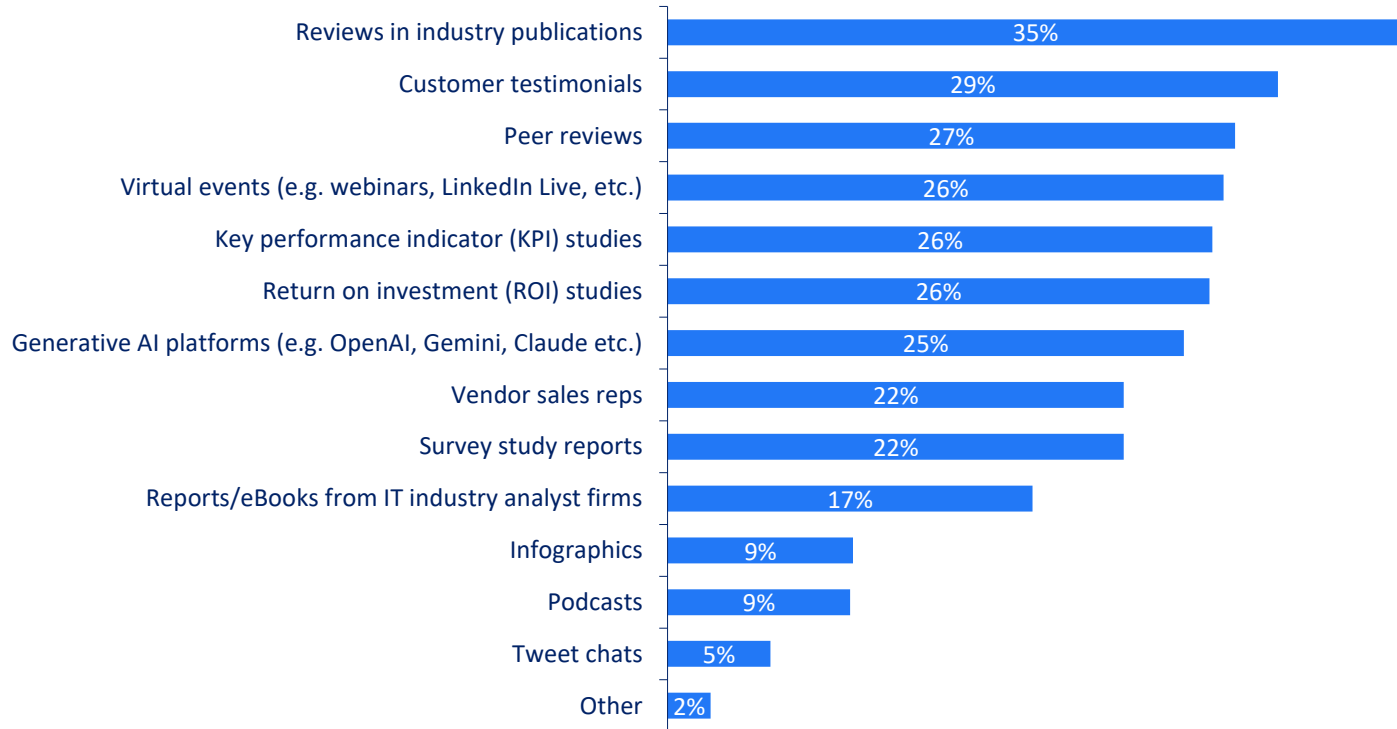
- Web search (e.g., Google, Microsoft Edge, etc.)
- Technology analyst sites
- Business/technology publications (e.g., WSJ, NY Times, Wired, etc.)
- Peer review sites (e.g., G2 Crowd, GetApp, TrustPilot, etc.)
- Vendor email newsletters
- Vendor website
- Social media sites (e.g., LinkedIn, Twitter, TikTok, etc.)
- Online associations/communities
- Vendors' application marketplaces
- Other



21) What online information sources do you visit most often to learn about new technology solutions and trends?, Sample Size = 738 (Select up to 3 responses)



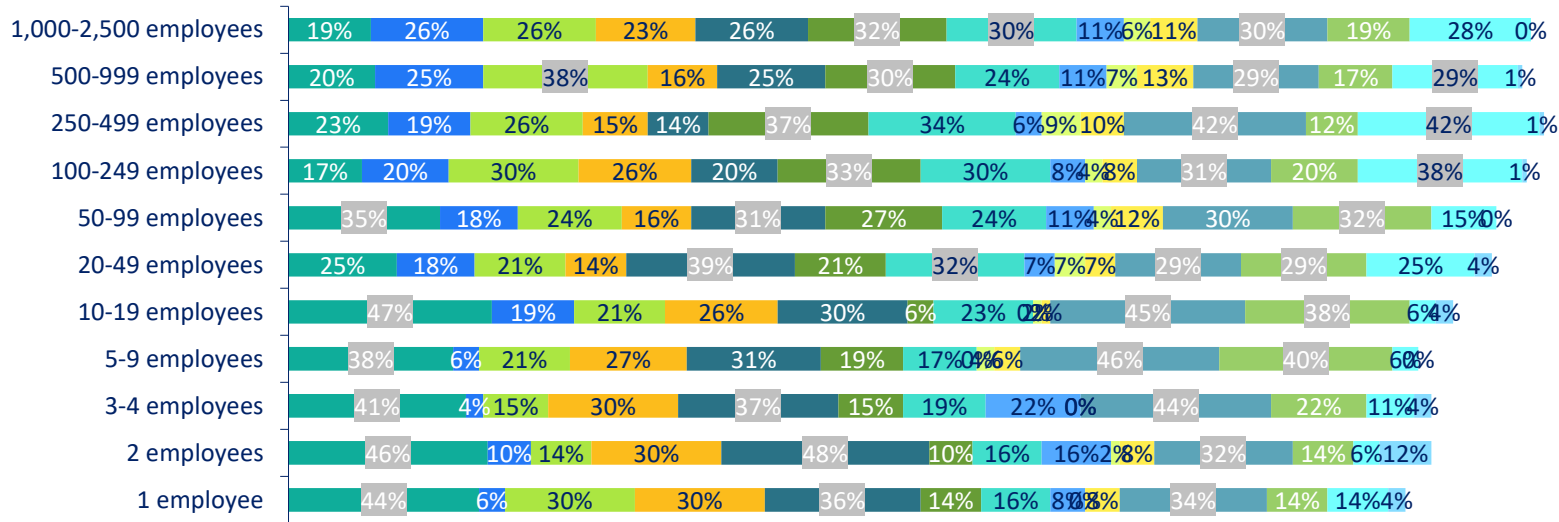
# Content Preferences for Learning About Technology Solutions



22) What types of content do you prefer for learning about technology solutions?, Sample Size = 738 (Select up to 3 responses)

# Content Preferences for Learning About Technology Solutions by Employee Size

- Customer testimonials
- Reports/eBooks from IT industry analyst firms
- Virtual events (e.g. webinars, LinkedIn Live, etc.)
- Survey study reports
- Peer reviews
- Key performance indicator (KPI) studies
- Return on investment (ROI) studies
- Podcasts
- Tweet chats
- Infographics
- Reviews in industry publications
- Vendor sales reps
- Generative AI platforms (e.g. OpenAI, Gemini, Claude etc.)
- Other



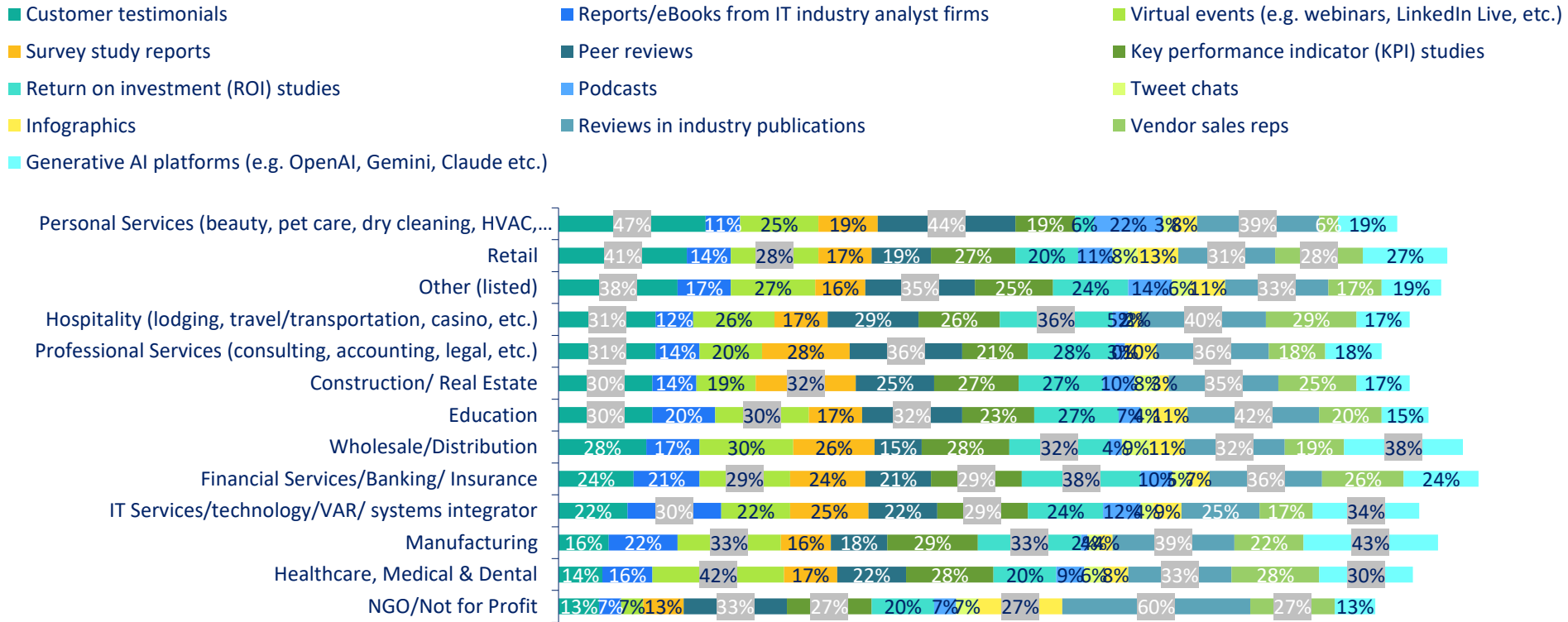
22) What types of content do you prefer for learning about technology solutions?, Sample Size = 738 (Select up to 3 responses)

# Content Preferences for Learning About Technology Solutions by Employee Size

Employee Size	#1 Content Preference	#2 Content Preference	#3 Content Preference
1,000-2,500	KPI Studies (32%)	ROI Studies, Industry Reviews (30%)	
500-999	Virtual Events (38%)	KPI Studies (30%)	Industry Reviews, GenAI Platforms (29%)
250-499	Industry Reviews, GenAI Platforms (42%)		KPI Studies (37%)
100-249	GenAI Platforms (38%)	KPI Studies (33%)	Industry Reviews (31%)
50-99	Customer Testimonials (35%)	Vendor Sales Reps (32%)	Peer Reviews (31%)
20-49	Peer Reviews (39%)	ROI Studies (32%)	Industry Reviews, Vendor Sales Reps (29%)
10-19	Customer Testimonials (47%)	Industry Reviews (45%)	Vendor Sales Reps (38%)
5-9	Industry Reviews (46%)	Vendor Sales Reps (40%)	Customer Testimonials (38%)
3-4	Industry Reviews (44%)	Customer Testimonials (41%)	Peer Reviews (37%)
2	Peer Reviews (48%)	Customer Testimonials (46%)	Industry Reviews (32%)
1	Customer Testimonials (44%)	Peer Reviews (36%)	Industry Reviews (34%)

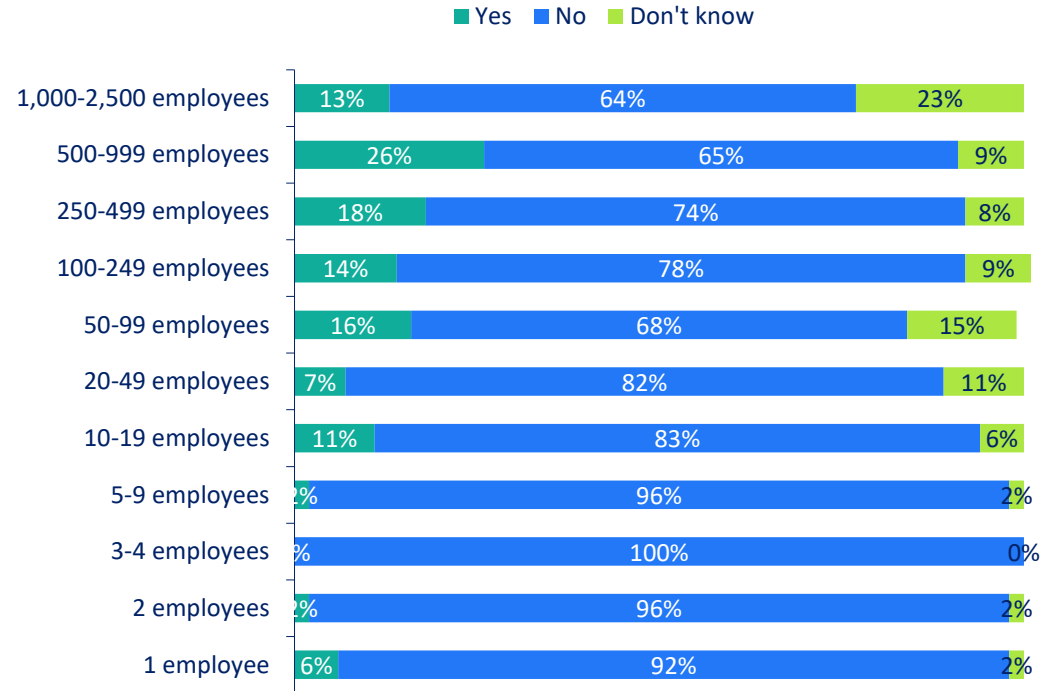
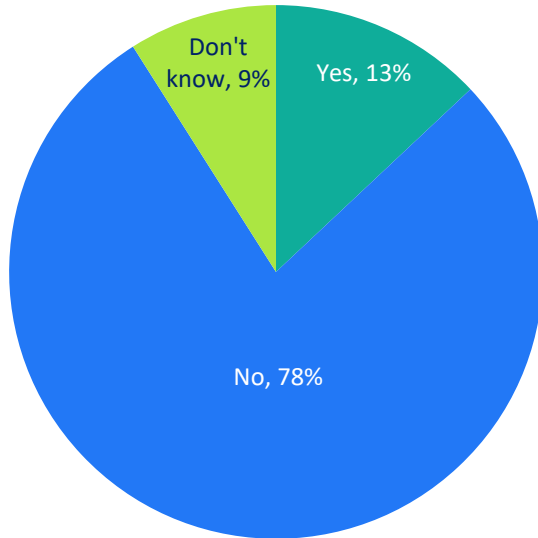
22) What types of content do you prefer for learning about technology solutions?, Sample Size = 738 (Select up to 3 responses)

# Content Preferences for Learning About Technology Solutions by Industry



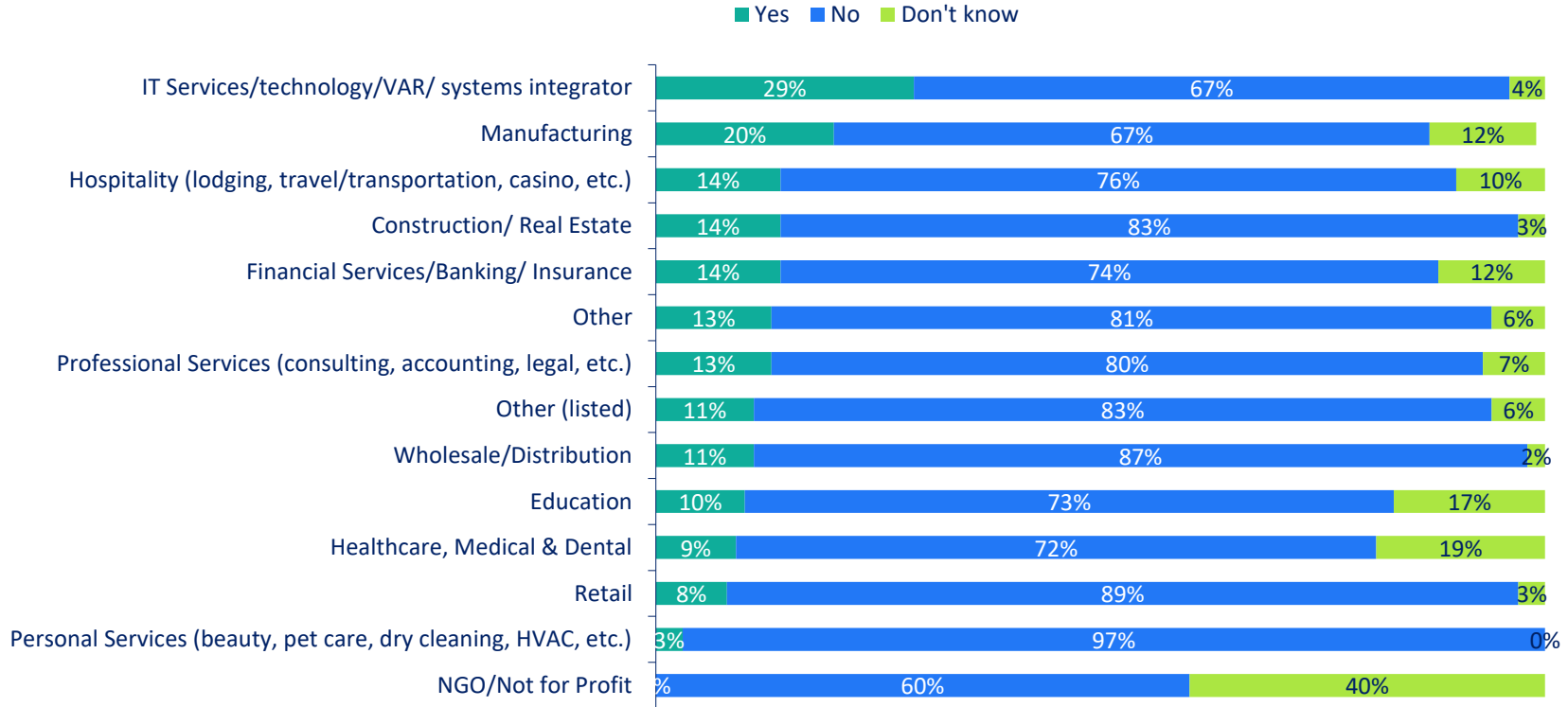
22) What types of content do you prefer for learning about technology solutions?, Sample Size = 738 (Select up to 3 responses)

# Whether SMBs Pay for Industry Analyst Subscriptions



23) Does your organization pay for a subscription to any industry analyst services?, Sample Size = 738

# Whether SMBs Pay for Industry Analyst Subscriptions by Industry



23) Does your organization pay for a subscription to any industry analyst services?, Sample Size = 738

# Firms SMBs that Say They Pay for Industry Analyst Services Say They Subscribe To



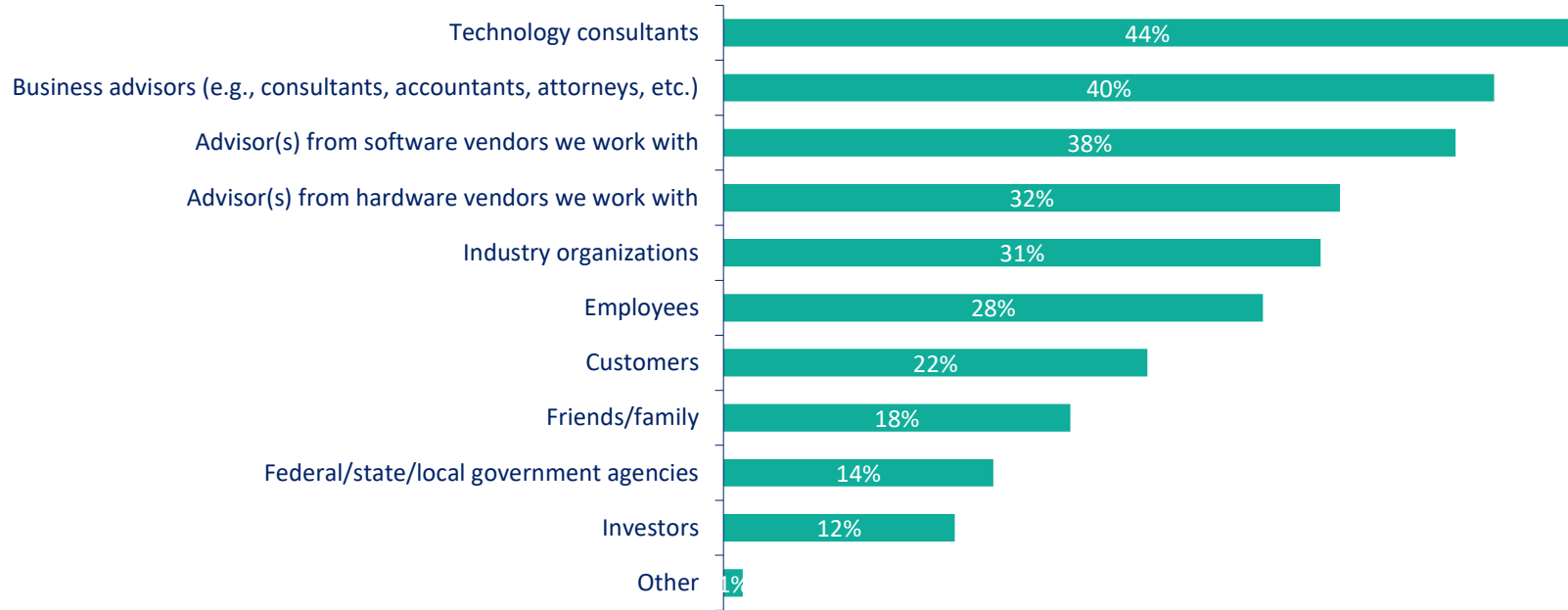
azure  
**Frost and Sullivan**  
AWS  
Goldman Sachs  
Microsoft  
Google  
Sale force  
**Forrester**  
Oracle  
QuickBooks  
**IDC**  
Cisco  
**IDC**  
IBM  
**Gartner, Inc**  
Ai  
**Gartner**  
STAR  
Microsoft  
Morgan and morgan  
Microsoft

Data Analytics Services  
IBM Technology Solutions  
Accenture  
Analysis  
Microsoft  
Microsoft  
CDW  
Microsoft  
IBIS  
SAP  
KPMG  
ADP  
**Gartner**  
D&B  
Nielsen  
Ernst and Young  
IBM  
IBM  
Keymapping  
Educational analysis

Educational analysis  
construction  
Deloitte  
**Infotech**  
Amazon  
Netflix  
**Infotech**  
Juniper  
Meyers  
Microsoft  
Microsoft  
**Gartner**  
**Gartner**  
ADP  
ADP  
Paycom  
**Aragon research**  
**IDC**  
**451 Research**

Q24: What analyst firm(s) does your organization pay for subscription services? (Open-ended question)

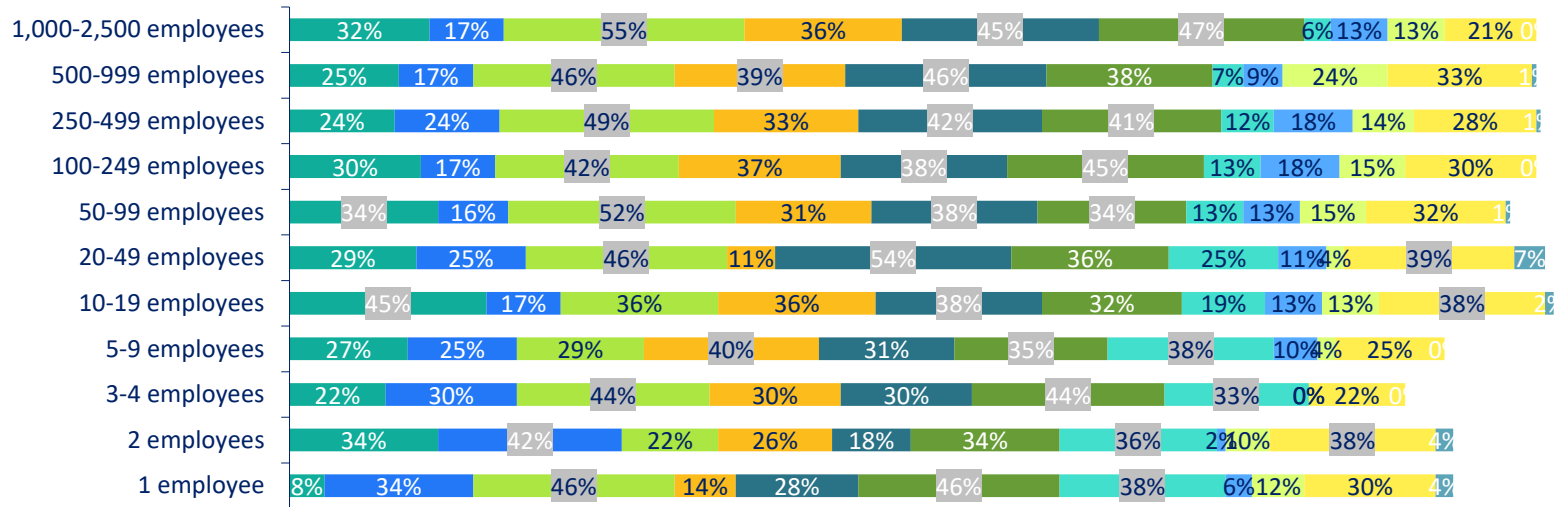
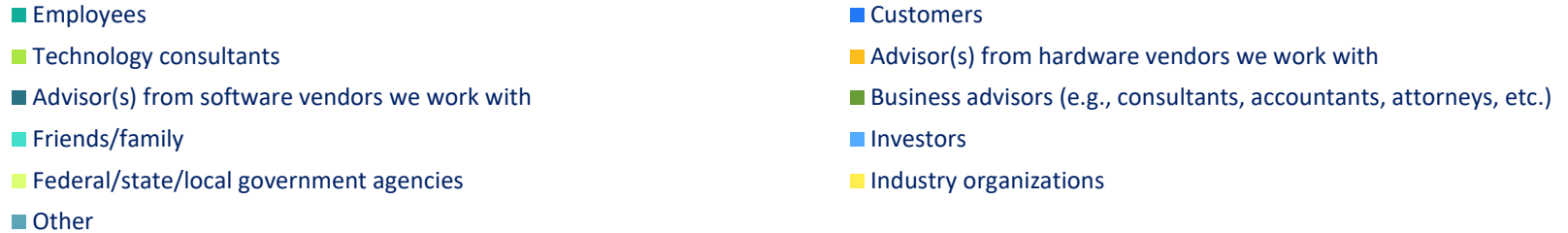
# Top Guidance Sources When Evaluating New Technology



25) Whose personal guidance are you most likely to consider when evaluating new technology solutions?, Sample Size = 738 (Select up to 3 responses)



# Top Guidance Sources When Evaluating New Technology by Employee Size



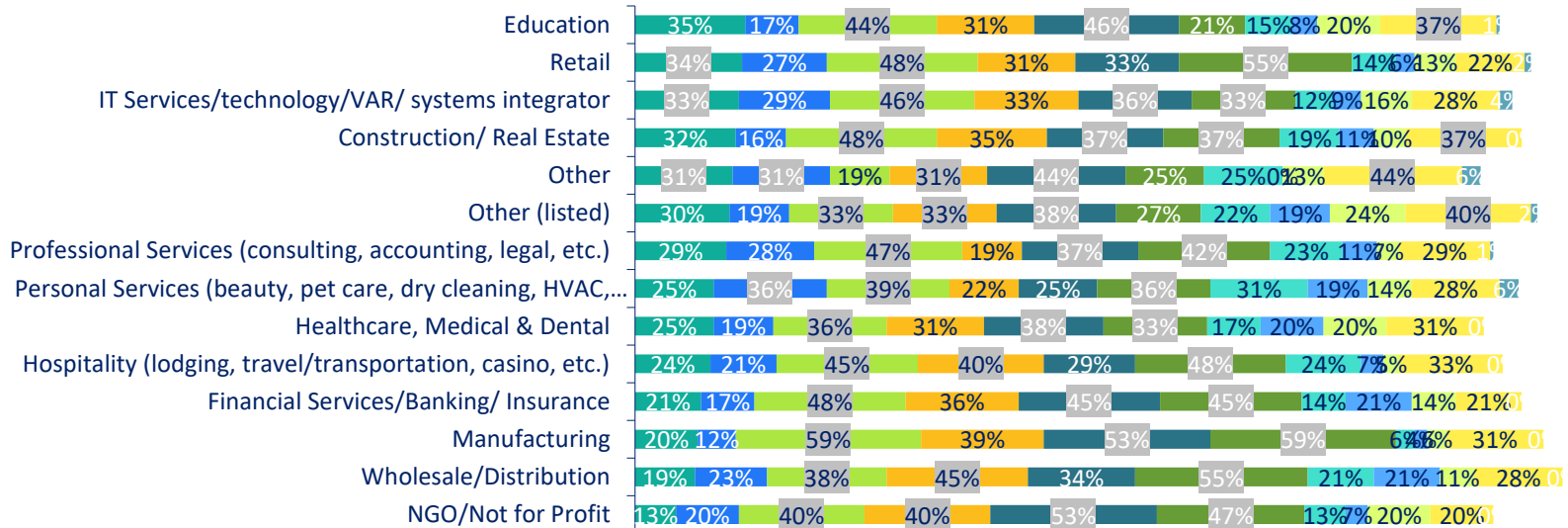
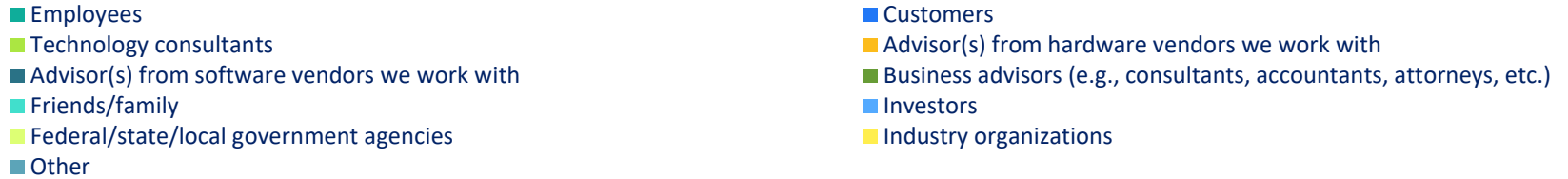
25) Whose personal guidance are you most likely to consider when evaluating new technology solutions?, Sample Size = 738 (Select up to 3 responses)

# Top Guidance Sources When Evaluating New Technology by Employee Size

Employee Size	#1 Guidance Source	#2 Guidance Source	#3 Guidance Source
1,000-2,500	Technology Consultants (55%)	Business Advisors (47%)	Software Vendor Advisors (45%)
500-999	Software Vendor Advisors , Technology Consultants (46%)		Hardware Vendor Consultants (45%)
250-499	Technology Consultants (49%)	Software Vendor Advisors (42%)	Business Advisors (41%)
100-249	Business Advisors (45%)	Technology Consultants (42%)	Software Vendor Advisors (38%)
50-99	Technology Consultants (52%)	Software Vendor Advisors (38%)	Employees, Business Advisors (34%)
20-49	Software Vendors (54%)	Technology Consultants (46%)	Industry Organizations (39%)
10-19	Employees (45%)	Industry Organizations, Software Vendor Advisors (38%)	
5-9	Hardware Vendor Advisors (40%)	Friends and Family (38%)	Business Advisors (35%)
3-4	Business Advisors, Technology Consultants (44%)		Friends and Family (33%)
2	Customers (42%)	Industry Organizations (38%)	Friends and Family (36%)
1	Business Advisors, Technology Consultants (46%)		Friends and Family (38%)

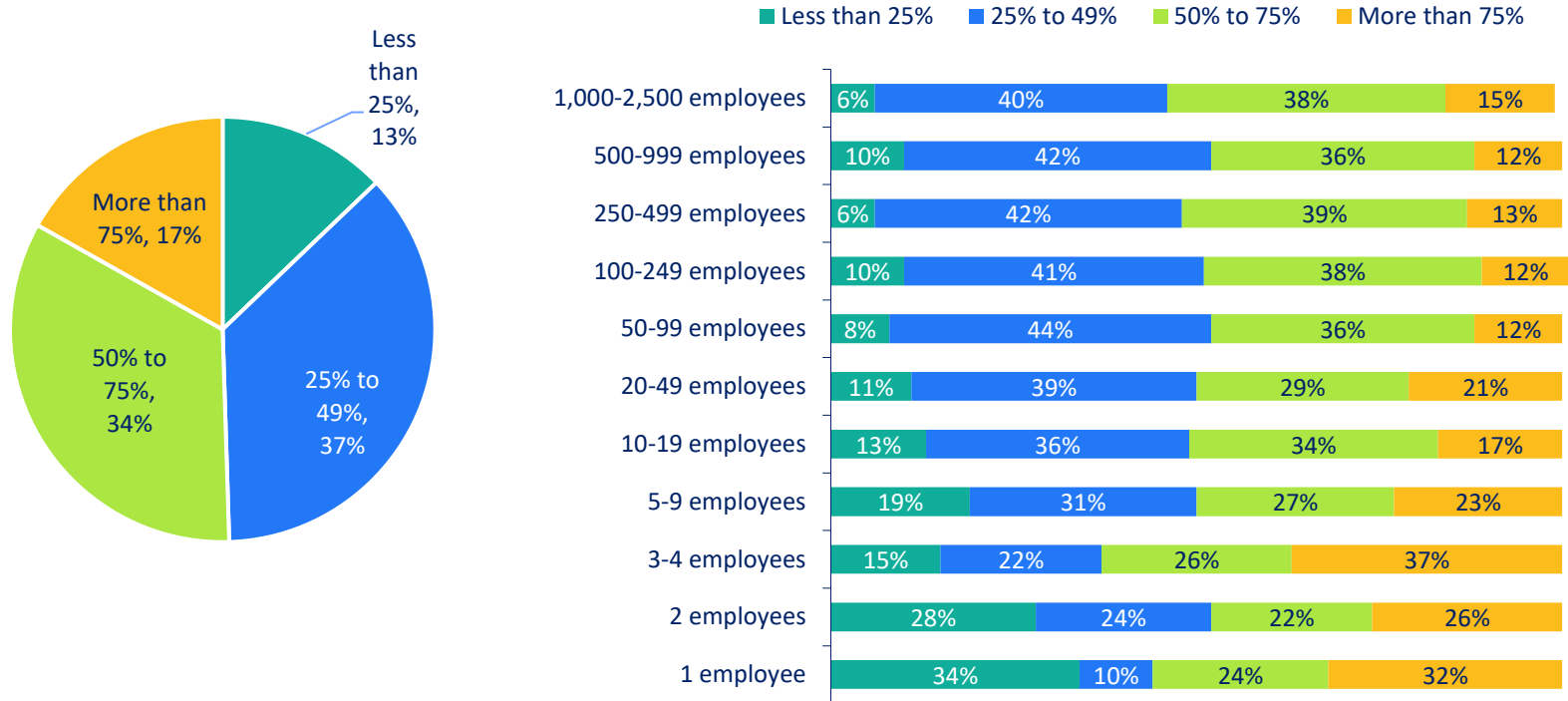
25) Whose personal guidance are you most likely to consider when evaluating new technology solutions?, Sample Size = 738 (Select up to 3 responses)

# Top Guidance Sources When Evaluating New Technology by Industry



25) Whose personal guidance are you most likely to consider when evaluating new technology solutions?, Sample Size = 738 (Select up to 3 responses)

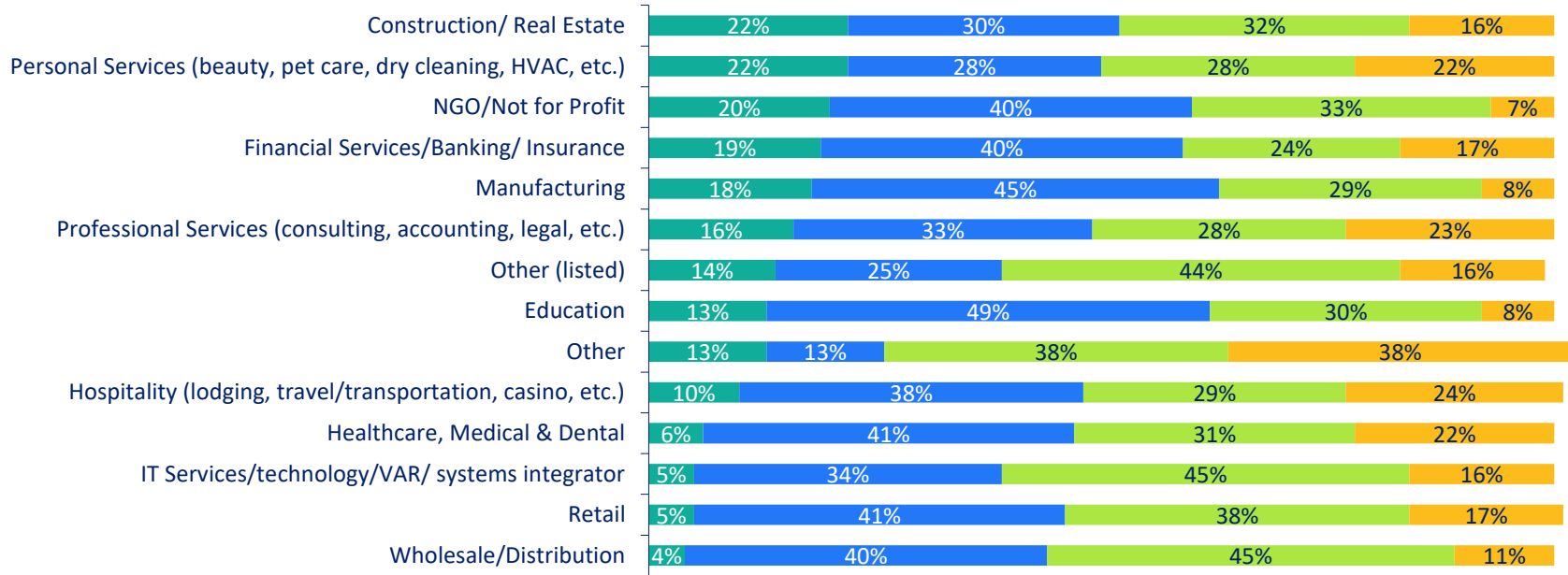
# Proportion of the Research, Evaluation, and Selection Process SMBs Complete Before Contacting a Vendor



26) In general, what proportion of the research, evaluation, and selection process does your organization complete internally before contacting a technology vendor or provider?, Sample Size = 738

# Proportion of the Research, Evaluation, and Selection Process SMBs Complete Before Contacting a Vendor by Industry

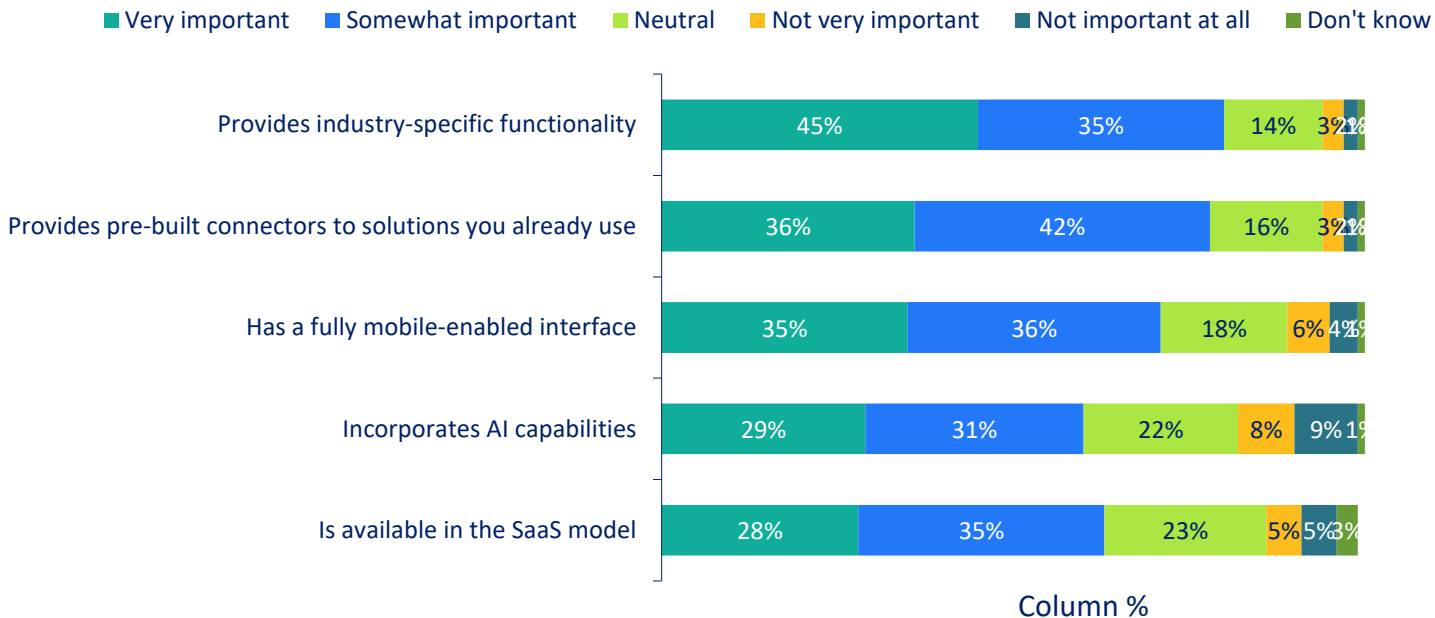
■ Less than 25% ■ 25% to 49% ■ 50% to 75% ■ More than 75%



26) In general, what proportion of the research, evaluation, and selection process does your organization complete internally before contacting a technology vendor or provider?, Sample Size = 738

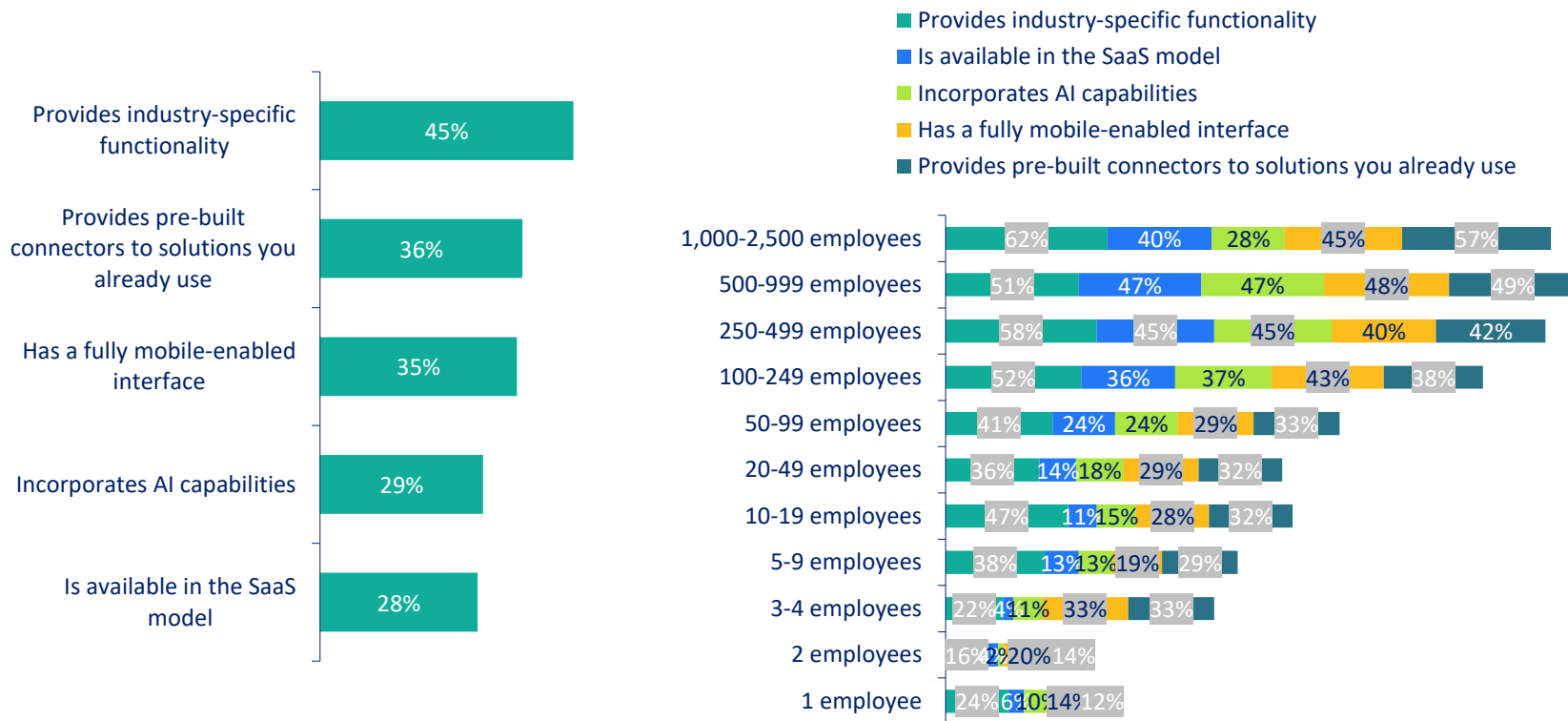
# SMB Software Purchase Criteria and Channels

# Importance of Capabilities in Business and Collaboration Software



32) When considering new business and collaboration software solutions, how important is that the solution:, Sample Size = 738

# “Very Important” Capabilities in Business and Collaboration Software



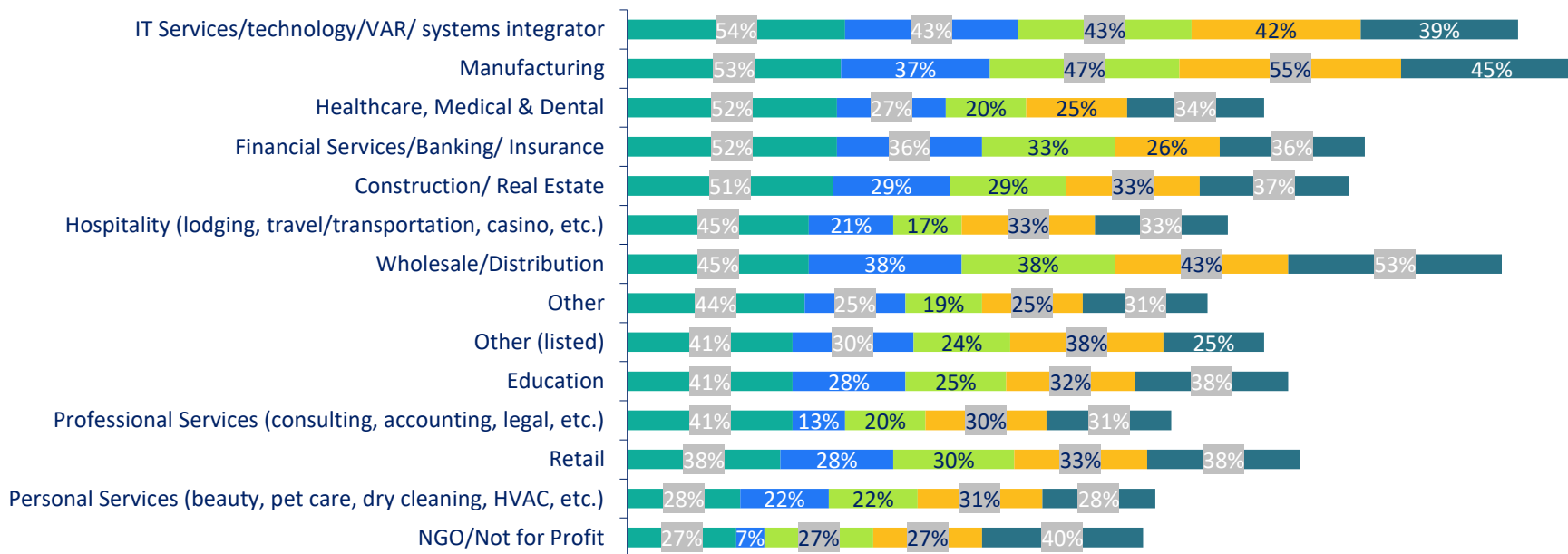
32) When considering new business and collaboration software solutions, how important is that the solution: Very important, Sample Size

= 738



# “Very Important” Capabilities in Business and Collaboration Software by Industry

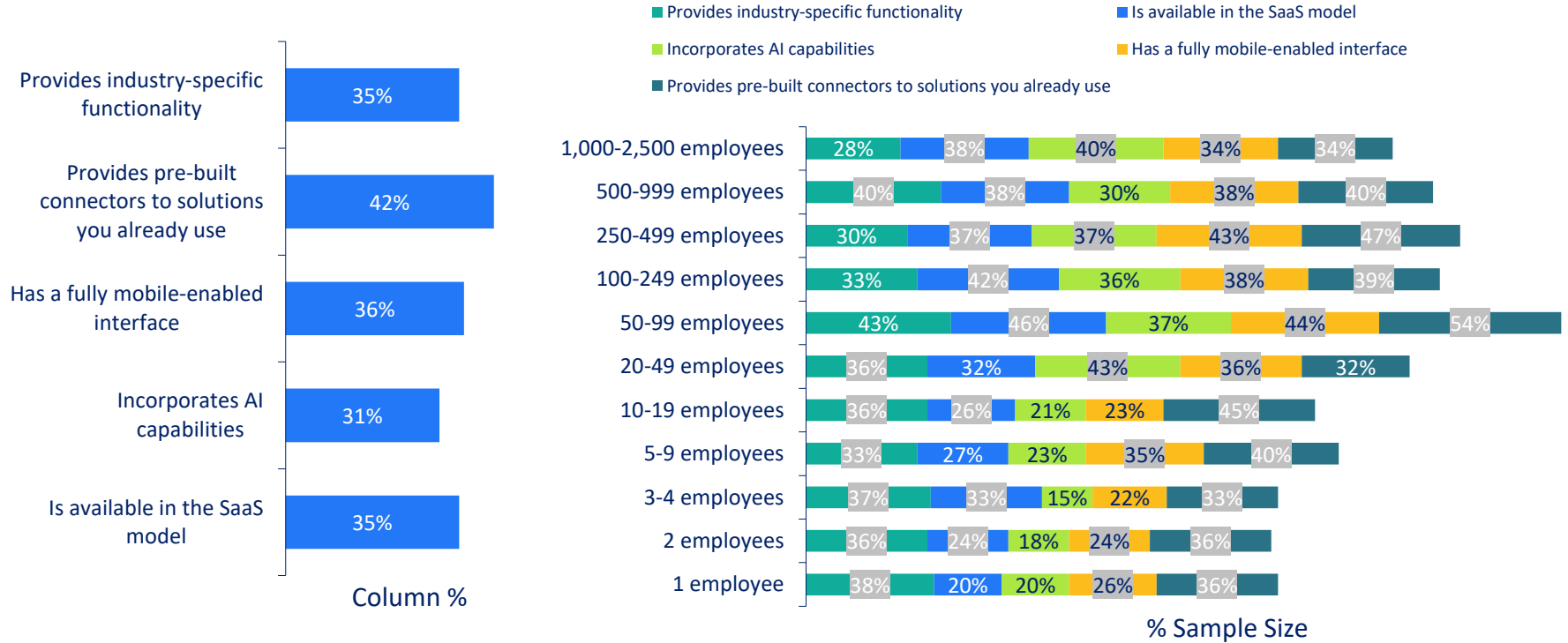
- Provides industry-specific functionality
- Is available in the SaaS model
- Incorporates AI capabilities
- Has a fully mobile-enabled interface
- Provides pre-built connectors to solutions you already use



32) When considering new business and collaboration software solutions, how important is that the solution: Very Important, Sample Size

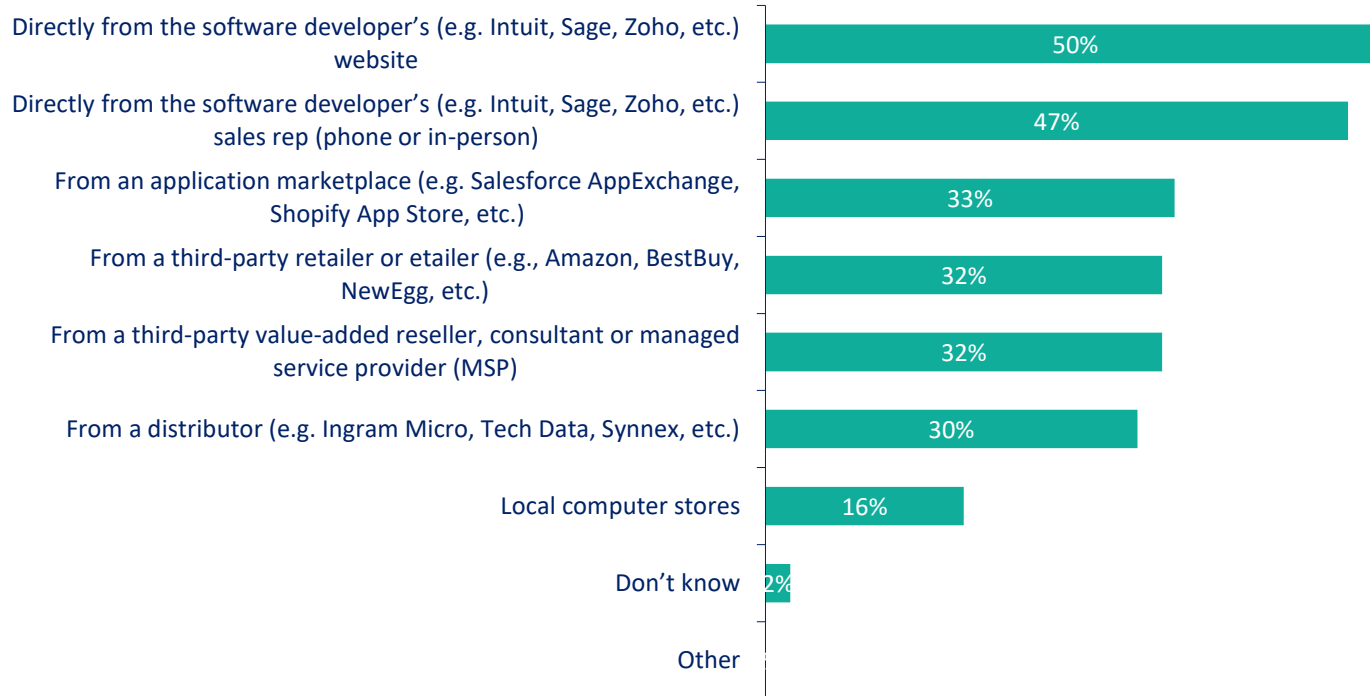
= 738

# “Somewhat Important” Capabilities in Business and Collaboration Software



32) When considering new business and collaboration software solutions, how important is that the solution: Somewhat important, Sample Size = 738

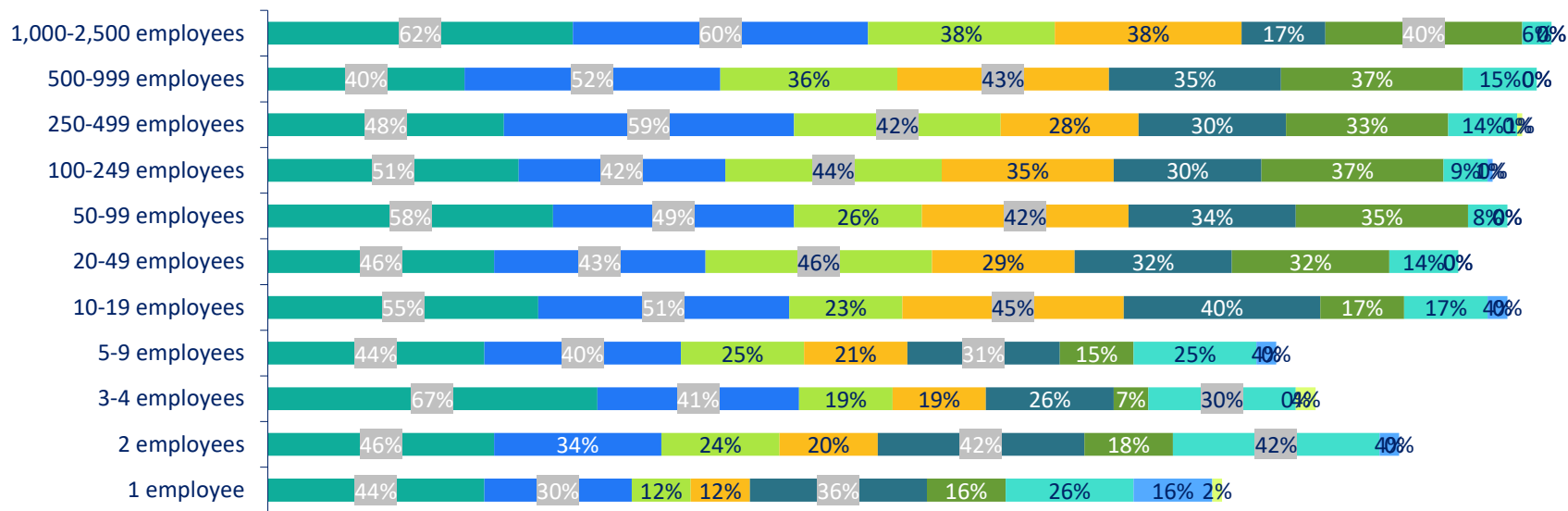
# Top SMB Software Purchase Channels



31) How does your organization usually purchase business and collaboration software?, Sample Size = 738 (Select up to 3 responses)

# SMB Software Purchase Channels by Employee Size

- Directly from the software developer's (e.g. Intuit, Sage, Zoho, etc.) website
- From an application marketplace (e.g. Salesforce AppExchange, Shopify App Store, etc.)
- From a third-party retailer or etailer (e.g., Amazon, BestBuy, NewEgg, etc.)
- Local computer stores
- Other
- Directly from the software developer's (e.g. Intuit, Sage, Zoho, etc.) sales rep (phone or in-person)
- From a third-party value-added reseller, consultant or managed service provider (MSP)
- From a distributor (e.g. Ingram Micro, Tech Data, Synnex, etc.)
- Don't know



31) How does your organization usually purchase business and collaboration software?, Sample Size = 738 ((Select up to 3 responses)

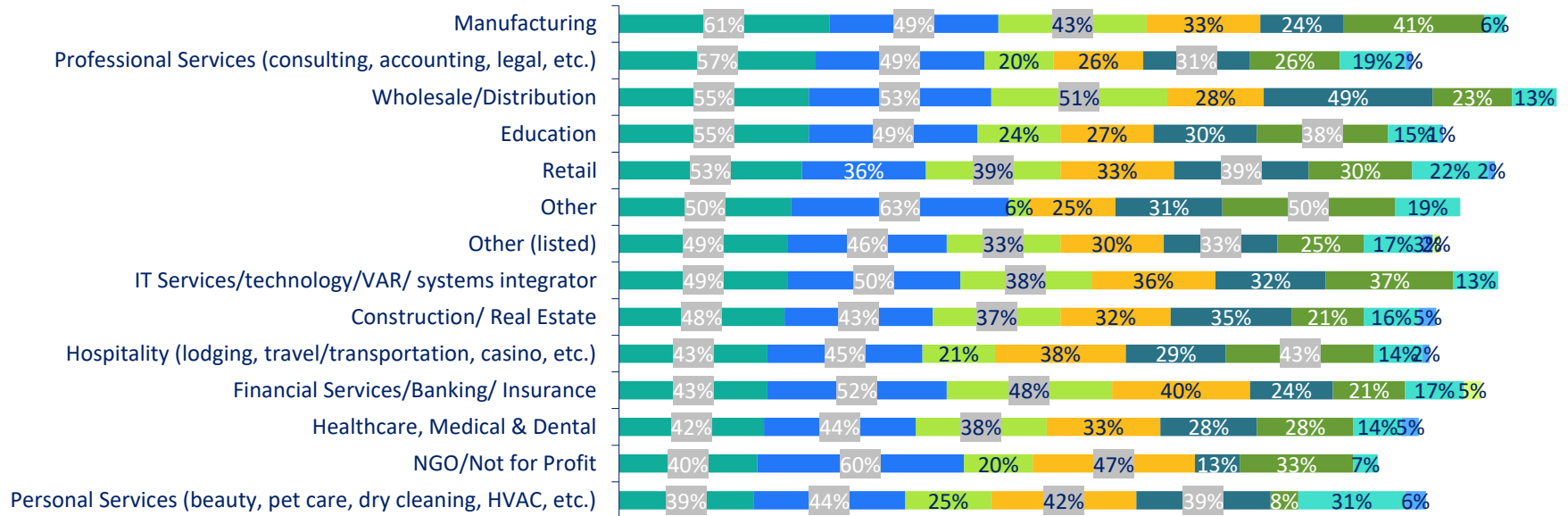
# SMB Software Purchase Channels by Employee Size

Employee Size	#1 Channel	#2 Channel	#3 Channel
1,000-2,500	Directly from the software developer's website (62%)	Directly from the software developer's sales rep (60%)	From a distributor (40%)
500-999	Directly from the software developer's sales rep (52%)	From a third-party value-added reseller, consultant, or managed services provider (43%)	Directly from the software developer's website (40%)
250-499	Directly from the software developer's sales rep (59%)	Directly from the software developer's website (48%)	From an application marketplace (42%)
100-249	Directly from the software developer's website (51%)	From an application marketplace (44%)	Directly from the software developer's sales rep (42%)
50-99	Directly from the software developer's website (58%)	Directly from the software developer's sales rep (49%)	From a third-party value-added reseller, consultant, or managed services provider (42%)
20-49	Directly from the software developer's website, From an application marketplace (46%)		Directly from the software developer's sales rep (43%)
10-19	Directly from the software developer's website (55%)	Directly from the software developer's sales rep (51%)	From a third-party value-added reseller, consultant, or managed services provider (45%)
5-9	Directly from the software developer's website (44%)	Directly from the software developer's sales rep (40%)	From a third-party retailer or e-tailer (31%)
3-4	Directly from the software developer's website (67%)	Directly from the software developer's sales rep (41%)	Local computer stores (30%)
2	Directly from the software developer's website (46%)	From a third-party retailer or e-tailer, Local computer stores (42%)	
1	Directly from the software developer's website (44%)	From a third-party retailer or e-tailer (36%)	Directly from the software developer's sales rep (30%)

31) How does your organization usually purchase business and collaboration software?, Sample Size = 738 ((Select up to 3 responses)

# SMB Software Purchase Channels by Industry

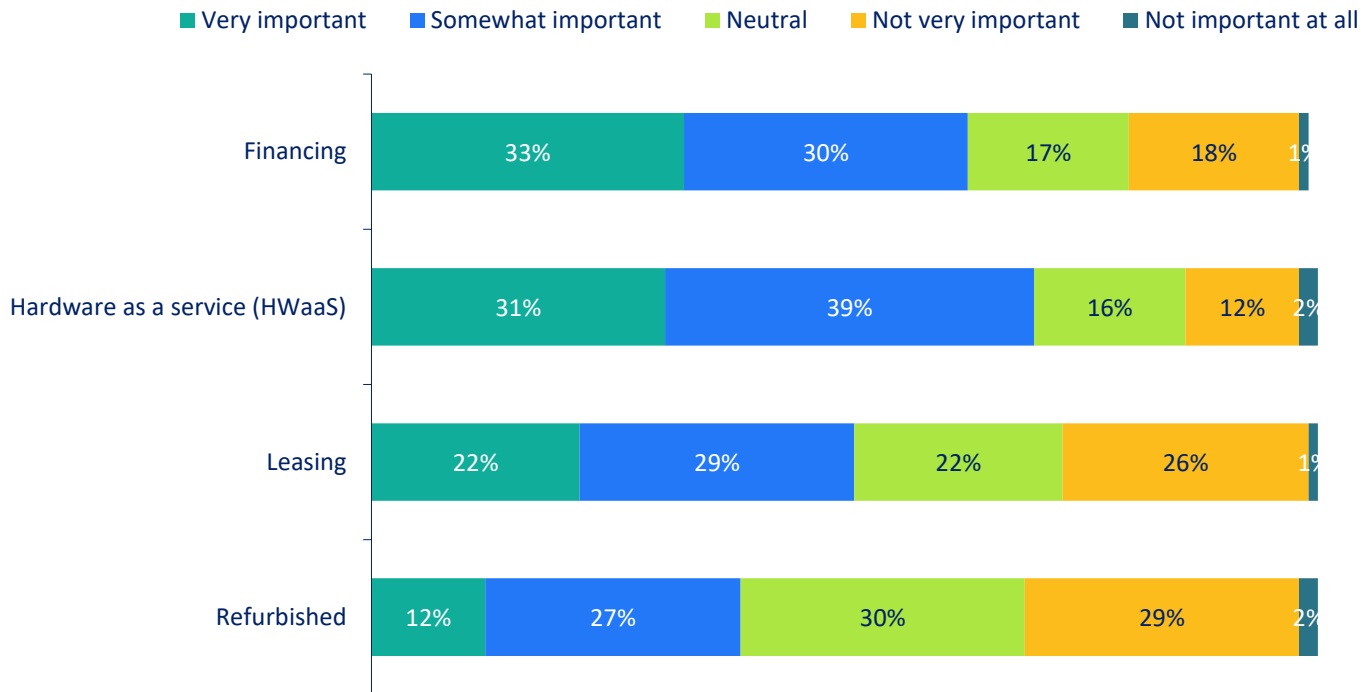
- Directly from the software developer's (e.g. Intuit, Sage, Zoho, etc.) website
- From an application marketplace (e.g. Salesforce AppExchange, Shopify App Store, etc.)
- From a third-party retailer or etailer (e.g., Amazon, BestBuy, NewEgg, etc.)
- Local computer stores
- Other
- Directly from the software developer's (e.g. Intuit, Sage, Zoho, etc.) sales rep (phone or in-person)
- From a third-party value-added reseller, consultant or managed service provider (MSP)
- From a distributor (e.g. Ingram Micro, Tech Data, Synnex, etc.)
- Don't know



31) How does your organization usually purchase business and collaboration software?, Sample Size = 738 (Select up to 3 responses)

# PC, Laptop and Tablet Purchase Criteria and Channels

# Importance of Purchasing Options in PCs, Laptops, and Tablets

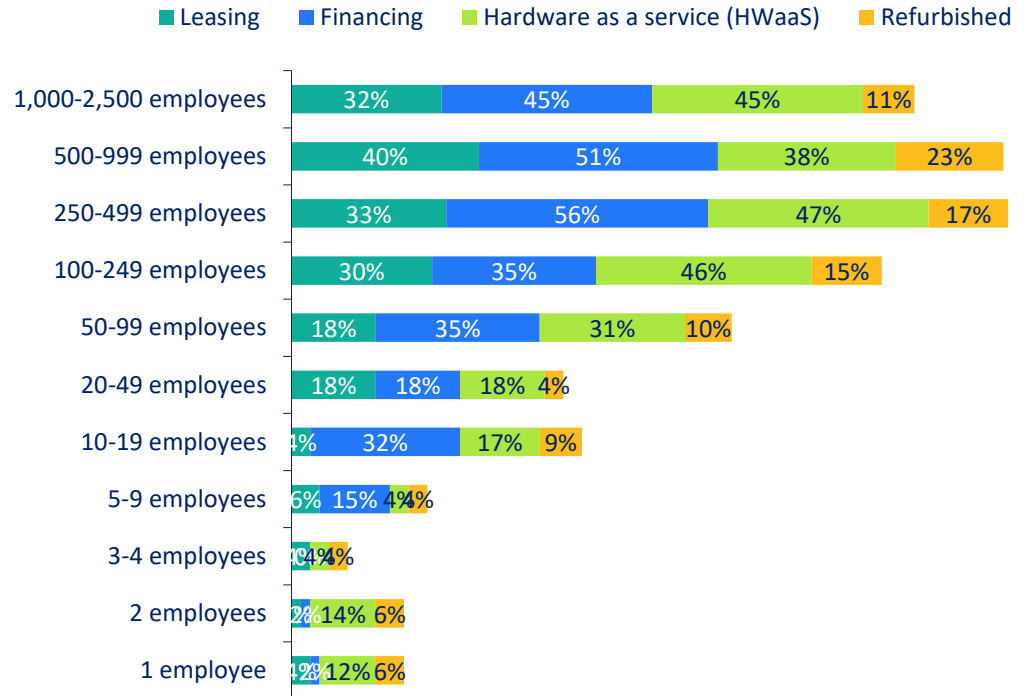
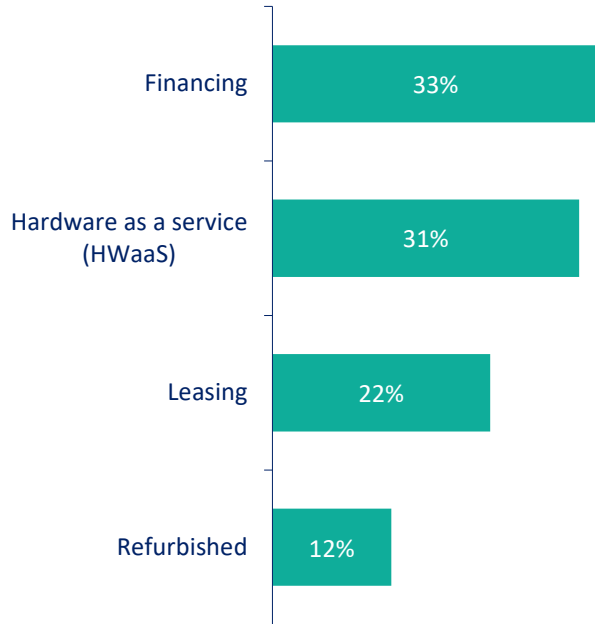


34) When evaluating new PCs, laptops, and tablets, how important are the following purchasing options to your decision-making process? Very important, Sample Size = 738



# “Very Important” Purchase Criteria for PCs, Laptops and Tablets

## Very Important

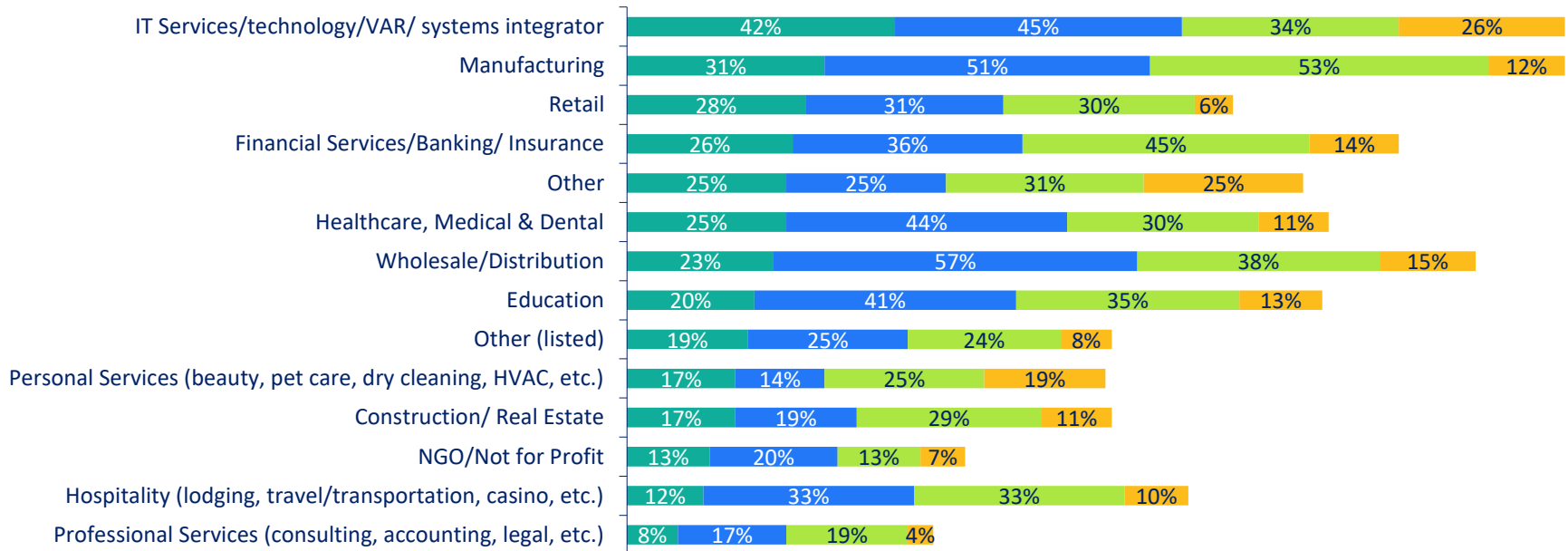


34) When evaluating new PCs, laptops, and tablets, how important are the following purchasing options to your decision-making process? Very important, Sample Size = 738

# “Very Important” Purchase Criteria for PCs, Laptops and Tablets by Industry

## Very Important

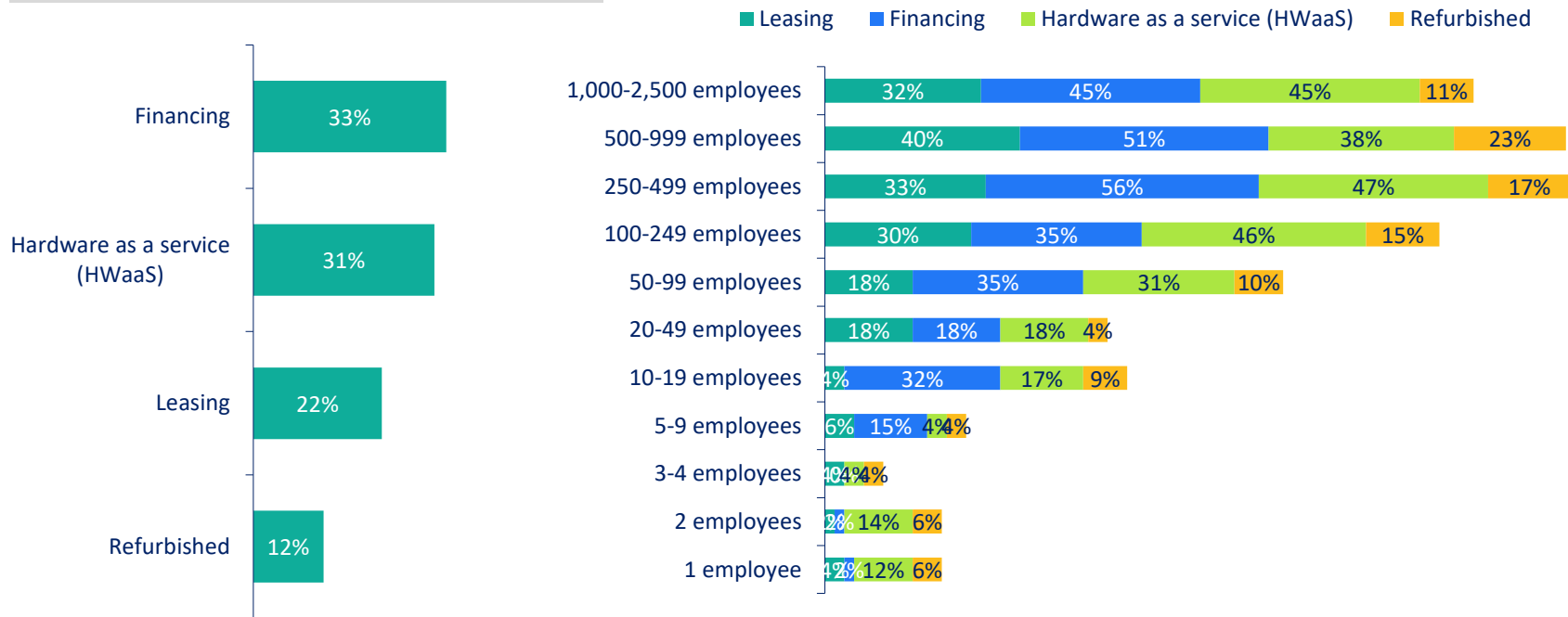
■ Leasing ■ Financing ■ Hardware as a service (HWaaS) ■ Refurbished



34) When evaluating new PCs, laptops, and tablets, how important are the following purchasing options to your decision-making process?  
 very imp, Sample Size = 738

# “Somewhat Important” Purchase Criteria for PCs, Laptops and Tablets

## Somewhat Important

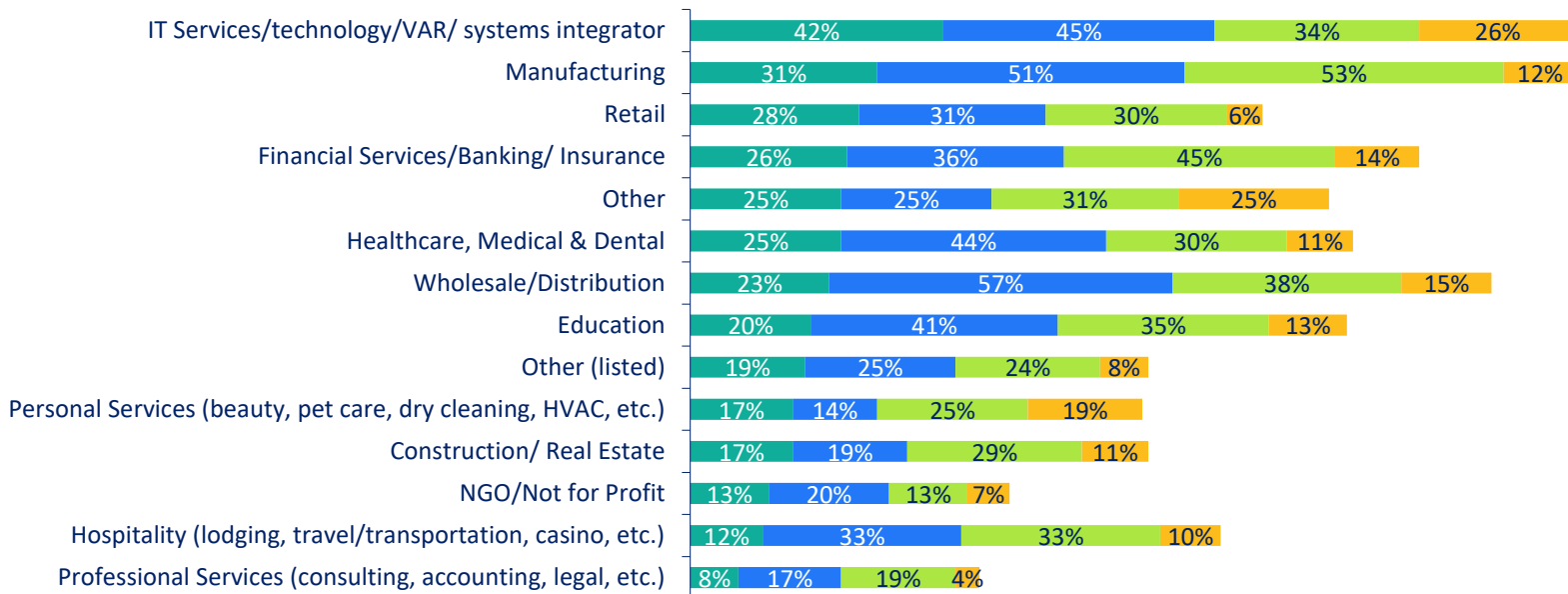


34) When evaluating new PCs, laptops, and tablets, how important are the following purchasing options to your decision-making process? Somewhat important, Sample Size = 738

# “Somewhat Important” Purchase Criteria for PCs, Laptops and Tablets by Industry

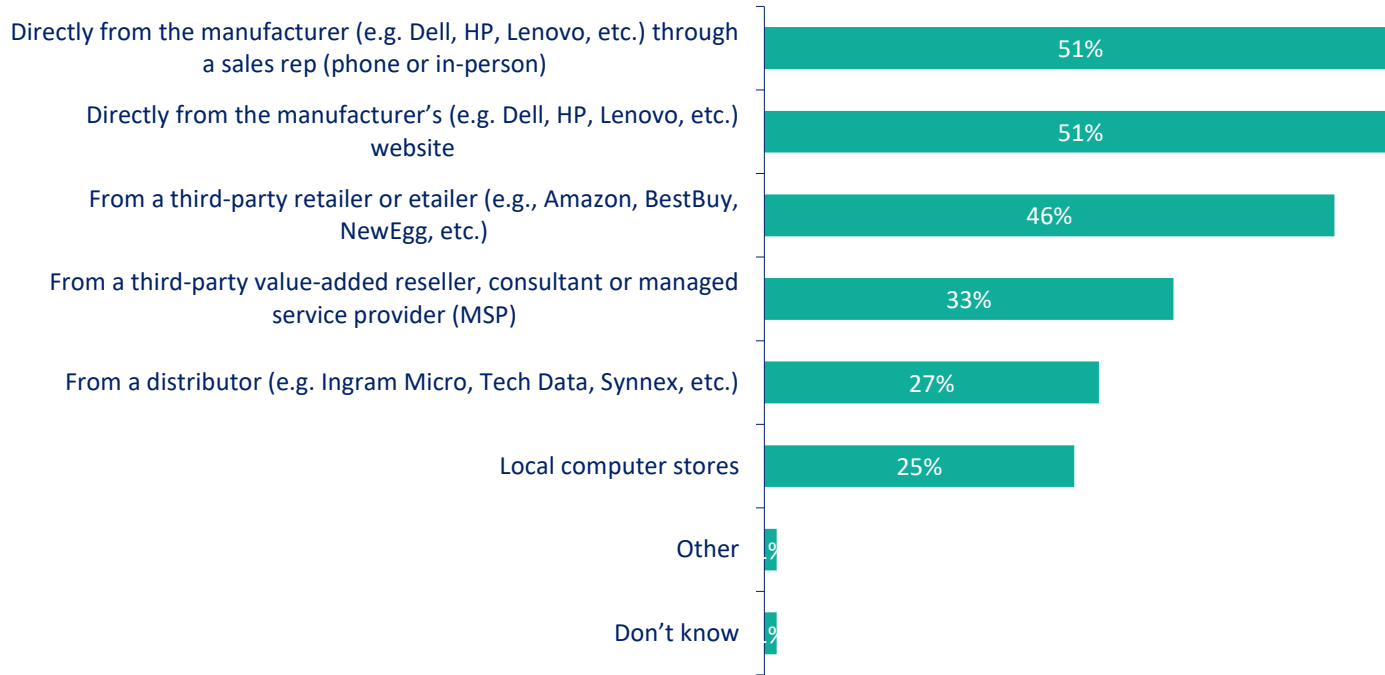
## Somewhat Important

■ Leasing ■ Financing ■ Hardware as a service (HWaaS) ■ Refurbished



34) When evaluating new PCs, laptops, and tablets, how important are the following purchasing options to your decision-making process?  
Somewhat imp, Sample Size = 738

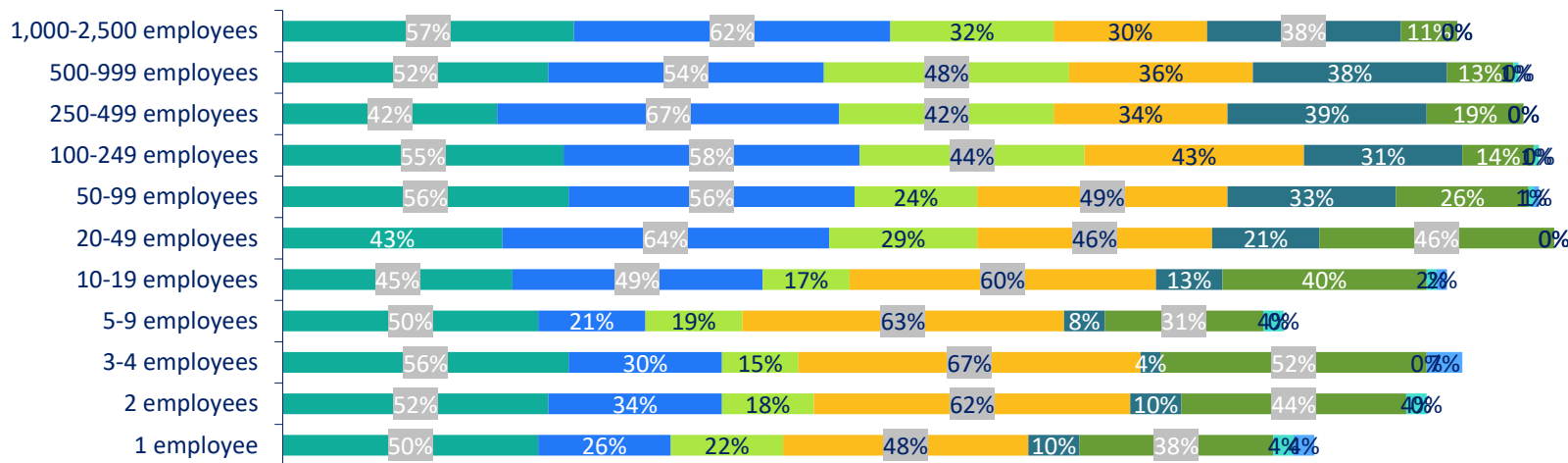
# SMB PC, Laptop, and Tablet Purchase Channels



33) How does your organization usually purchase PC, laptops and tablets?, Sample Size = 738 (Select up to 3 responses)

# SMB PC, Laptop, and Tablet Purchase Channels by Employee Size

- Directly from the manufacturer's (e.g. Dell, HP, Lenovo, etc.) website
- From a third-party value-added reseller, consultant or managed service provider (MSP)
- From a distributor (e.g. Ingram Micro, Tech Data, Synnex, etc.)
- Don't know
- Directly from the manufacturer (e.g. Dell, HP, Lenovo, etc.) through a sales rep (phone or in-person)
- From a third-party retailer or retailer (e.g., Amazon, BestBuy, NewEgg, etc.)
- Local computer stores
- Other



33) How does your organization usually purchase PC, laptops and tablets?, Sample Size = 738 (Select up to 3 responses)

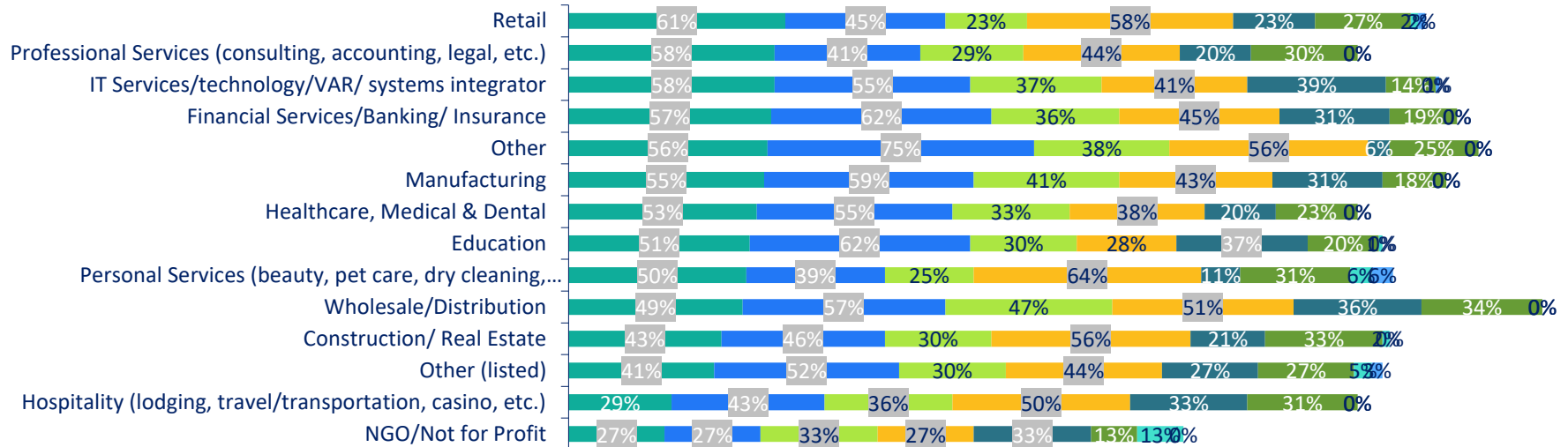
# SMB PC, Laptop, and Tablet Purchase Channels by Employee Size

Employee Size	#1 Channel	#2 Channel	#3 Channel
1,000-2,500	Directly from the manufacturer through a sales rep (62%)	Directly from the manufacturer's website (57%)	From a distributor (38%)
500-999	Directly from the manufacturer through a sales rep (54%)	Directly from the manufacturer's website (52%)	From a third-party value-added reseller, consultant, or managed services provider (48%)
250-499	Directly from the manufacturer through a sales rep (67%)	Directly from the manufacturer's website, From a third-party value-added reseller, consultant, or managed services provider (42%)	
100-249	Directly from the manufacturer through a sales rep (58%)	Directly from the manufacturer's website (55%)	From a third-party value-added reseller, consultant, or managed services provider (44%)
50-99	Directly from the manufacturer through a sales rep, directly from the manufacturer's website (56%)		From a third-party retailer or e-tailer (49%)
20-49	Directly from the manufacturer through a sales rep (64%)	From a third-party retailer or e-tailer, Local computer stores (46%)	
10-19	From a third-party retailer or e-tailer (60%)	Directly from the manufacturer through a sales rep (49%)	Directly from the manufacturer's website (45%)
5-9	From a third-party retailer or e-tailer (63%)	Directly from the manufacturer's website (50%)	Local computer stores (31%)
3-4	From a third-party retailer or e-tailer (67%)	Directly from the manufacturer's website (56%)	Local computer stores (52%)
2	From a third-party retailer or e-tailer (62%)	Directly from the manufacturer's website (52%)	Local computer stores (44%)
1	Directly from the manufacturer's website (50%)	From a third-party retailer or e-tailer (48%)	Local computer stores (38%)

33) How does your organization usually purchase PC, laptops and tablets?, Sample Size = 738 (Select up to 3 responses)

# SMB PC, Laptop, and Tablet Purchase Channels by Industry

- Directly from the manufacturer's (e.g. Dell, HP, Lenovo, etc.) website
- Directly from the manufacturer (e.g. Dell, HP, Lenovo, etc.) through a sales rep (phone or in-person)
- From a third-party value-added reseller, consultant or managed service provider (MSP)
- From a third-party retailer or retailer (e.g., Amazon, BestBuy, NewEgg, etc.)
- From a distributor (e.g. Ingram Micro, Tech Data, Synnex, etc.)
- Local computer stores
- Don't know
- Other

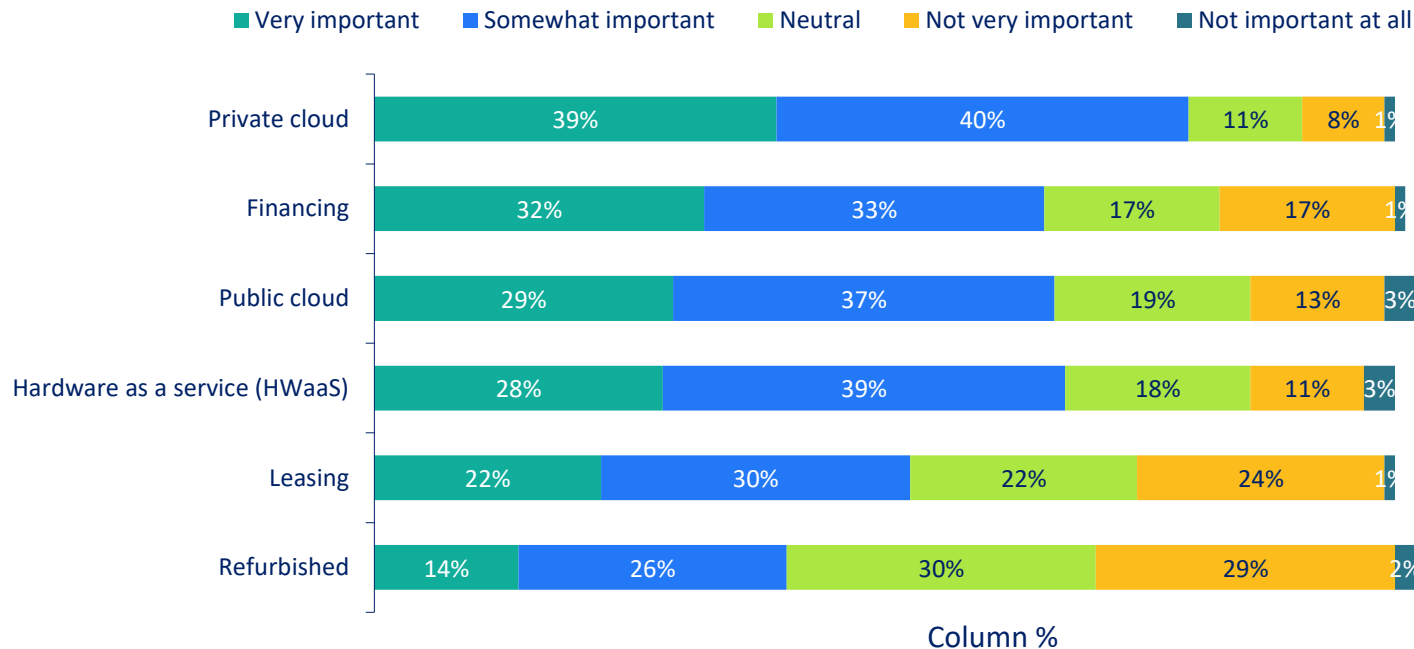


33) How does your organization usually purchase PC, laptops and tablets?, Sample Size = 738 (Select up to 3 responses)



# Technology Infrastructure Purchase Criteria and Channels

# Importance of Purchasing Options for Infrastructure Solutions

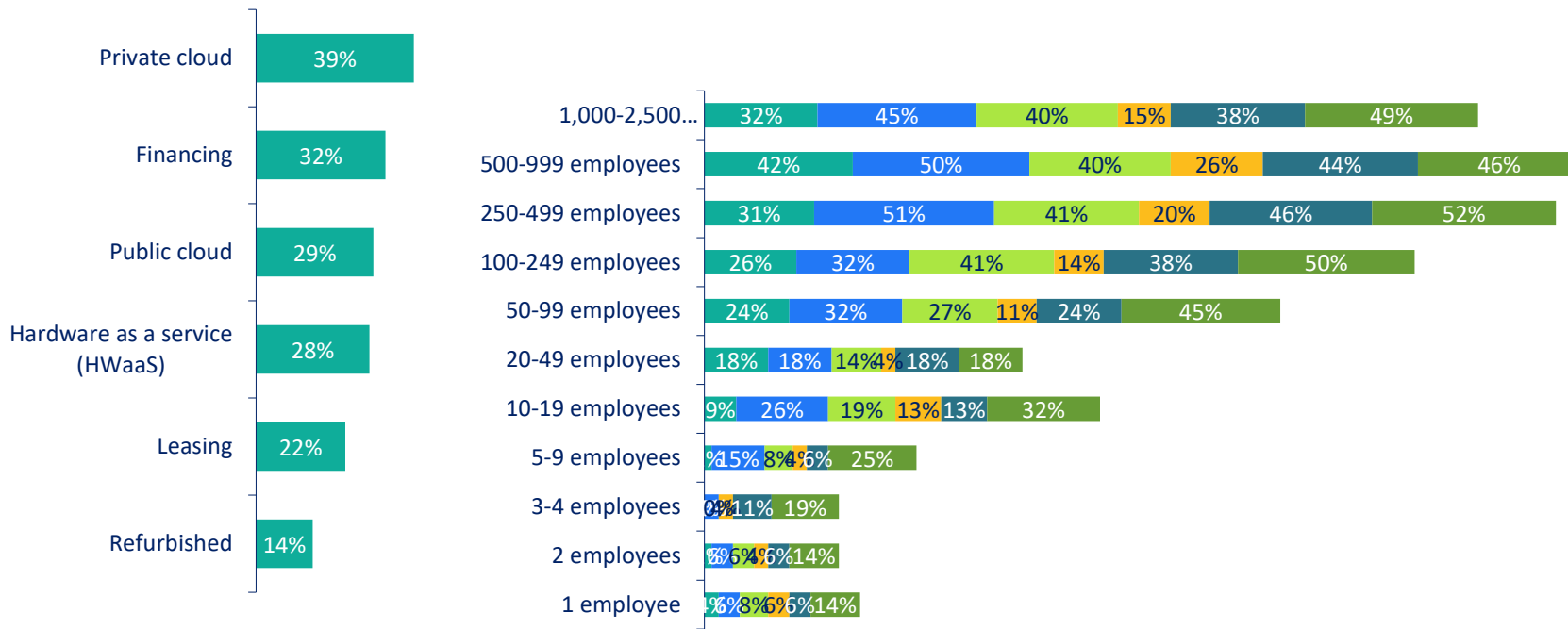


36) When evaluating new servers, storage, networking, security, and other infrastructure solutions, how important are the following purchasing options to your decision-making process? Very important, Sample Size = 738

# “Very Important” Purchasing Criteria for Infrastructure Technology

## Very Important

■ Leasing 
 ■ Financing 
 ■ Hardware as a service (HWaaS) 
 ■ Refurbished 
 ■ Public cloud 
 ■ Private cloud

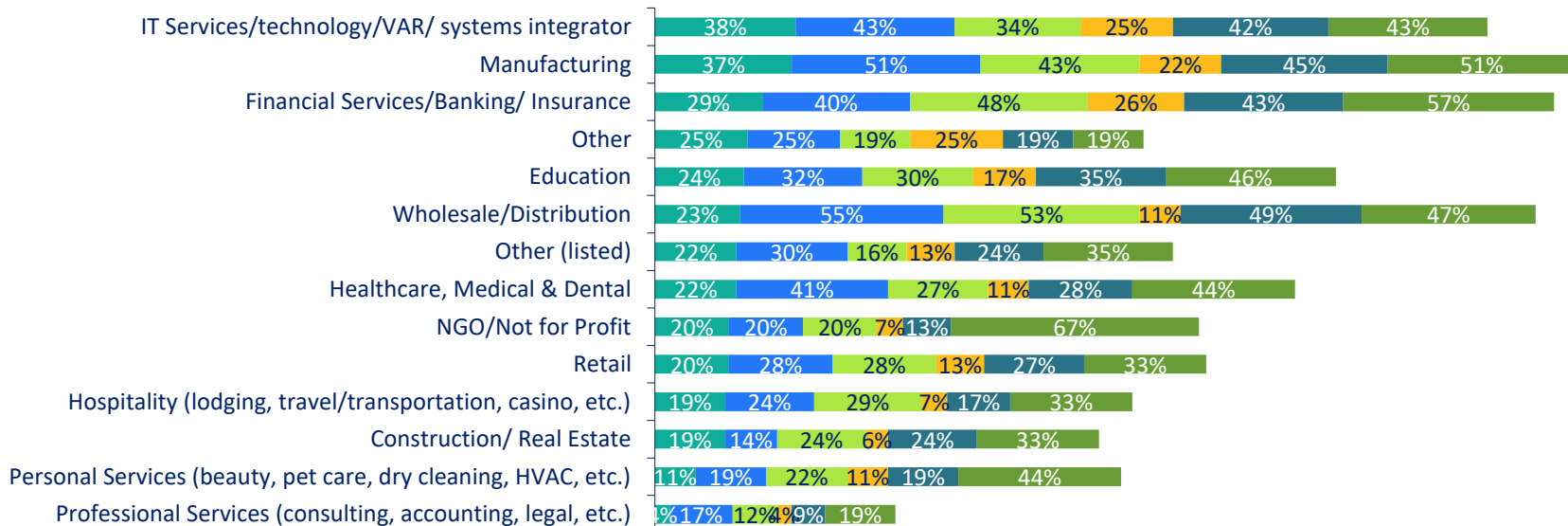


36) When evaluating new servers, storage, networking, security, and other infrastructure solutions, how important are the following purchasing options to your decision-making process? Very important, Sample Size = 738 (Select up to 3 responses)

# “Very Important” Purchasing Criteria for Infrastructure Technology by Industry

## Very Important

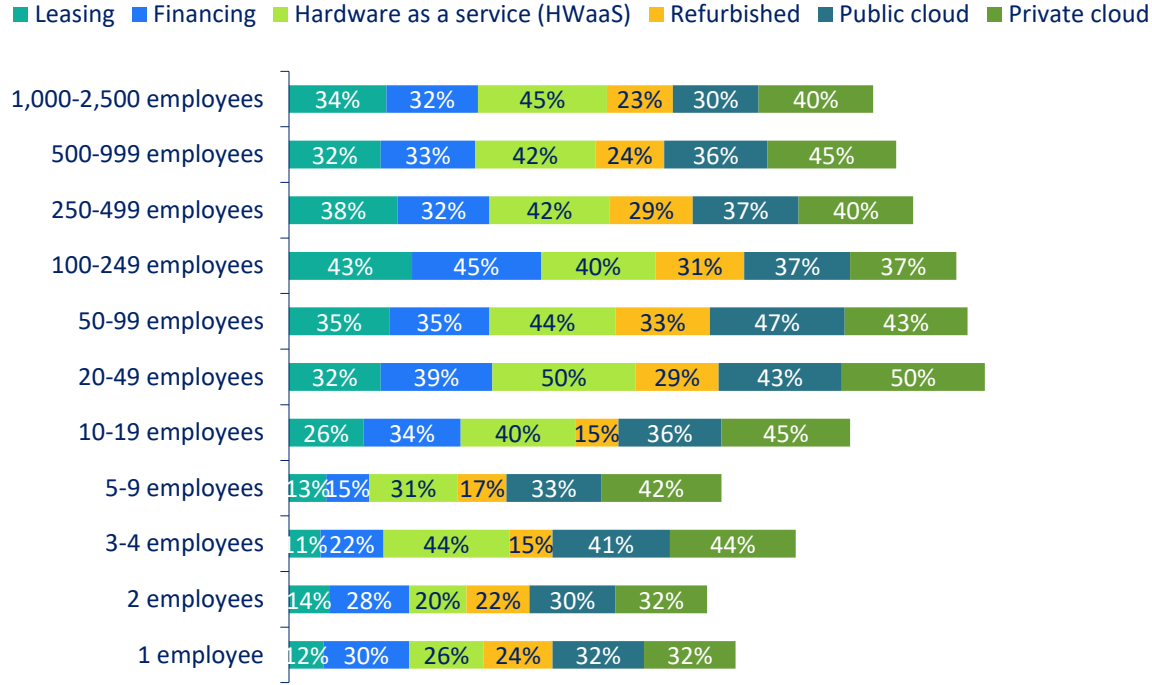
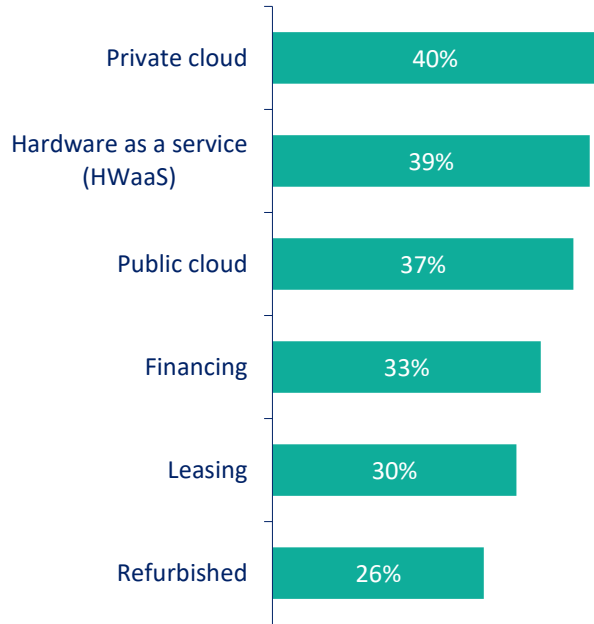
■ Leasing 
 ■ Financing 
 ■ Hardware as a service (HWaaS) 
 ■ Refurbished 
 ■ Public cloud 
 ■ Private cloud



36) When evaluating new servers, storage, networking, security, and other infrastructure solutions, how important are the following purchasing options to your decision-making process? very imp, Sample Size = 738 (Select up to 3 responses)

# “Somewhat Important” Purchasing Criteria for Infrastructure Technology

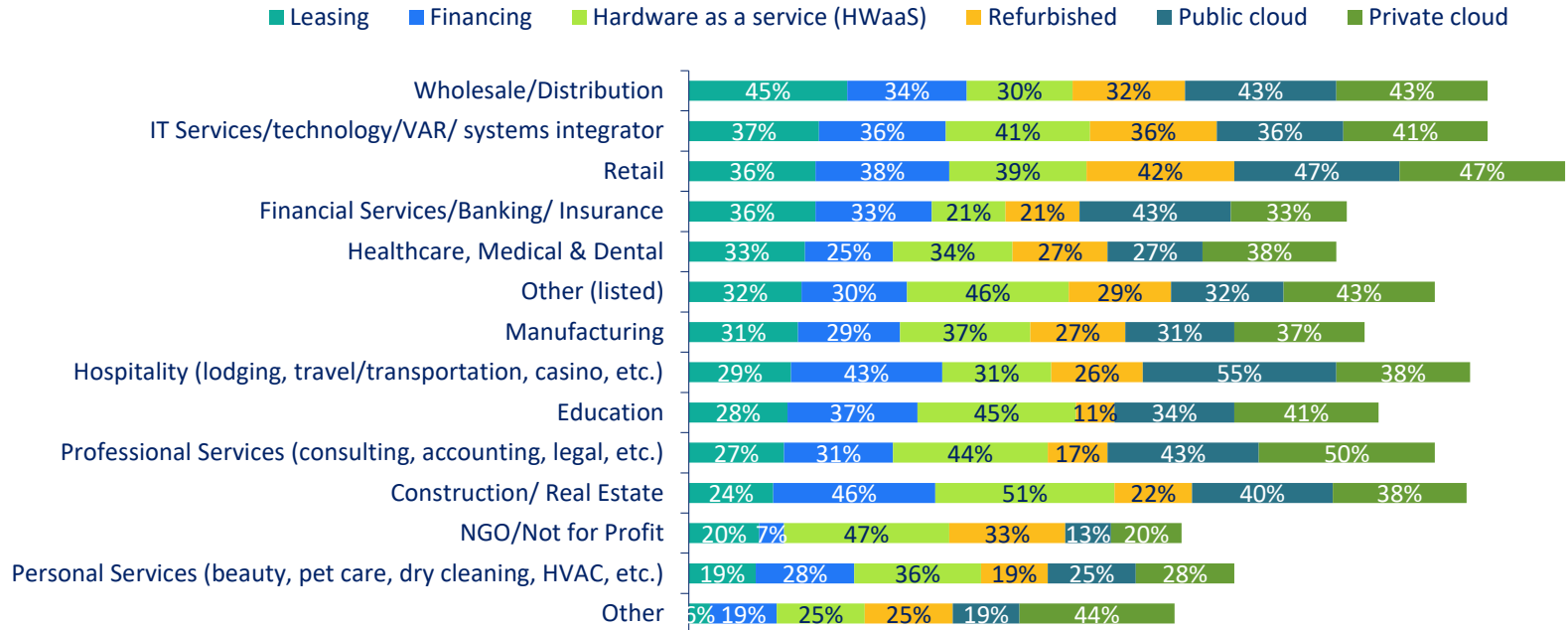
## Somewhat Important



36) When evaluating new servers, storage, networking, security, and other infrastructure solutions, how important are the following purchasing options to your decision-making process? Somewhat important, Sample Size = 738 (Select up to 3 responses)

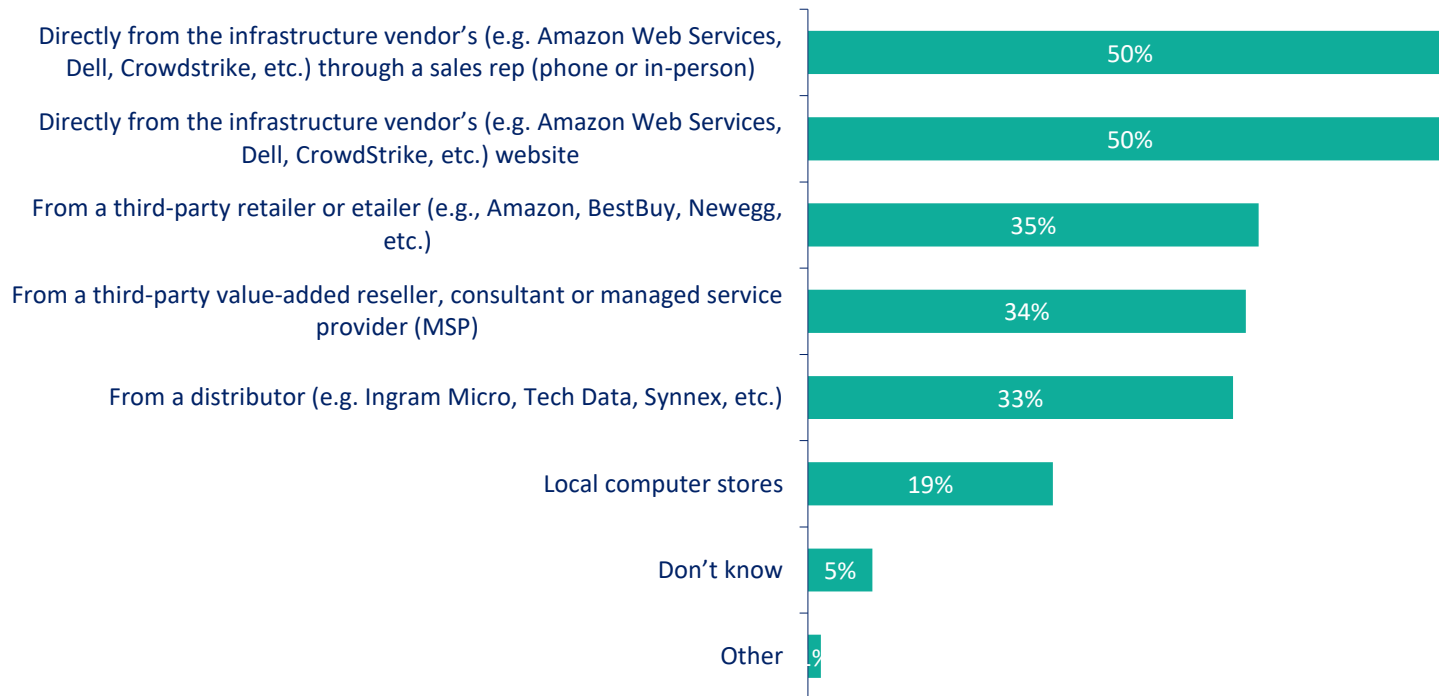
# “Somewhat Important” Purchasing Criteria for Infrastructure Technology by Industry

## Somewhat Important



36) When evaluating new servers, storage, networking, security, and other infrastructure solutions, how important are the following purchasing options to your decision-making process? Somewhat imp, Sample Size = 738 (Select up to 3 responses)

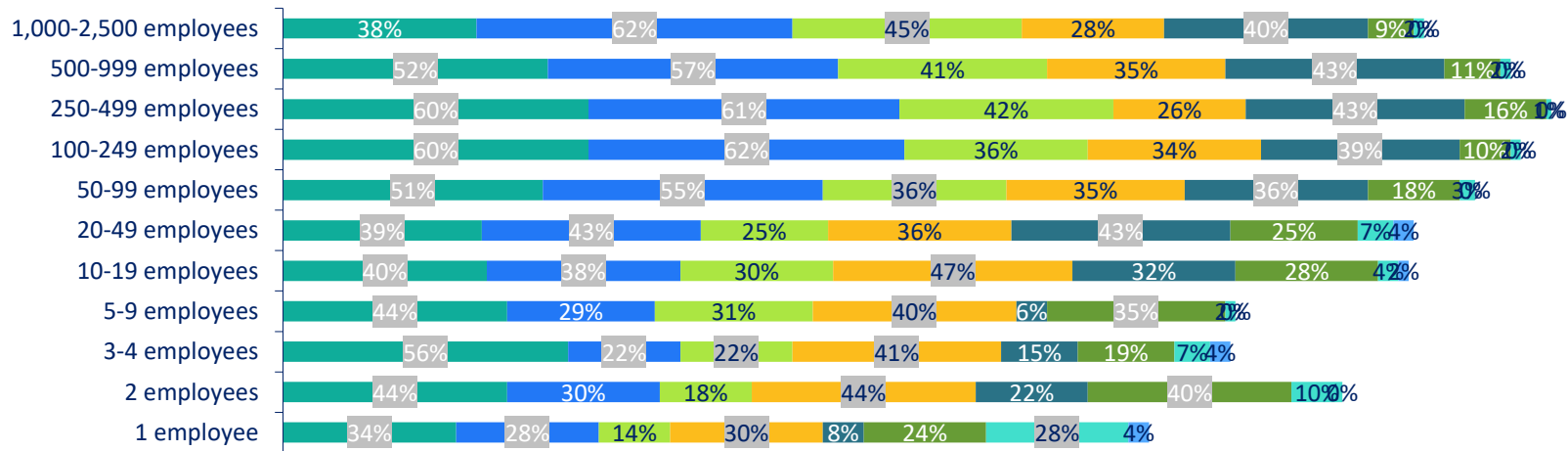
# Infrastructure Purchase Channels



35) How does your organization usually purchase servers, storage, networking, security, and other infrastructure solutions (for on premise and/or cloud deployment)?, Sample Size = 738 (Select up to 3 responses)

# Infrastructure Purchase Channels by Employee Size

- Directly from the infrastructure vendor's (e.g. Amazon Web Services, Dell, CrowdStrike, etc.) website
- Directly from the infrastructure vendor's (e.g. Amazon Web Services, Dell, CrowdStrike, etc.) through a sales rep (phone or in-person)
- From a third-party value-added reseller, consultant or managed service provider (MSP)
- From a third-party retailer or etailer (e.g., Amazon, BestBuy, Newegg, etc.)
- From a distributor (e.g. Ingram Micro, Tech Data, Synnex, etc.)
- Local computer stores
- Don't know
- Other



35) How does your organization usually purchase servers, storage, networking, security, and other infrastructure solutions (for on premise and/or cloud deployment)?, Sample Size = 738 (Select up to 3 responses)



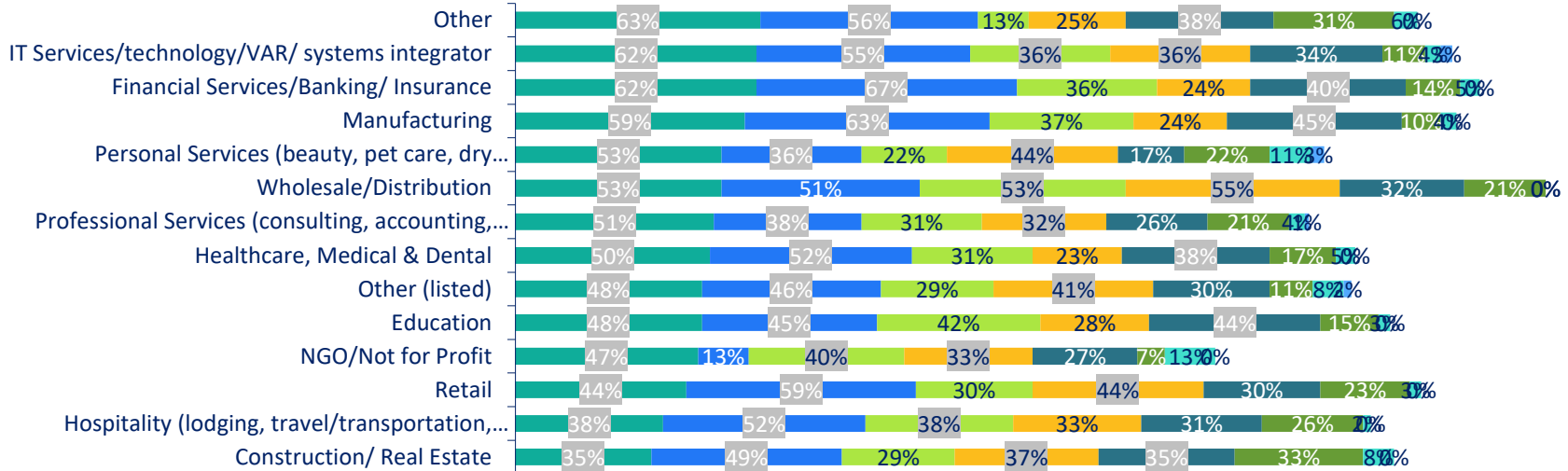
# Infrastructure Purchase Channels by Employee Size

Employee Size	#1 Channel	#2 Channel	#3 Channel
1,000-2,500	Directly from the infrastructure's vendor through a sales rep (62%)	From a third-party value-added reseller, consultant, or managed services provider (45%)	From a distributor (40%)
500-999	Directly from the infrastructure's vendor through a sales rep (57%)	Directly from the infrastructure's vendor's website (52%)	From a third-party value-added reseller, consultant, or managed services provider (43%)
250-499	Directly from the infrastructure's vendor through a sales rep (61%)	Directly from the infrastructure's vendor's website (60%)	From a distributor (43%)
100-249	Directly from the infrastructure's vendor through a sales rep (62%)	Directly from the infrastructure's vendor's website (60%)	From a distributor (39%)
50-99	Directly from the infrastructure's vendor through a sales rep (55%)	Directly from the infrastructure's vendor's website (51%)	From a third-party value-added reseller, consultant, or managed services provider, From a distributor (36%)
20-49	Directly from the infrastructure's vendor through a sales rep, From a distributor (43%)		Directly from the infrastructure's vendor's website (39%)
10-19	From a third-party retailer or e-tailer (47%)	Directly from the infrastructure's vendor's website (40%)	Directly from the infrastructure's vendor through a sales rep (38%)
5-9	Directly from the infrastructure's vendor's website (44%)	From a third-party retailer or e-tailer (40%)	Local computer stores (35%)
3-4	Directly from the infrastructure's vendor's website (56%)	From a third-party retailer or e-tailer (41%)	Directly from the infrastructure's vendor through a sales rep, From a third-party value-added reseller, consultant, or managed services provider (22%)
2	Directly from the infrastructure's vendor's website, from a third-party retailer or e-tailer (44%)		Local computer stores (40%)
1	Directly from the infrastructure's vendor's website (34%)	From a third-party retailer or e-tailer (30%)	Directly from the infrastructure's vendor through a sales rep, Don't know (28%)

35) How does your organization usually purchase servers, storage, networking, security, and other infrastructure solutions (for on premise and/or cloud deployment)?, Sample Size = 738 (Select up to 3 responses)

# Infrastructure Purchase Channels by Industry

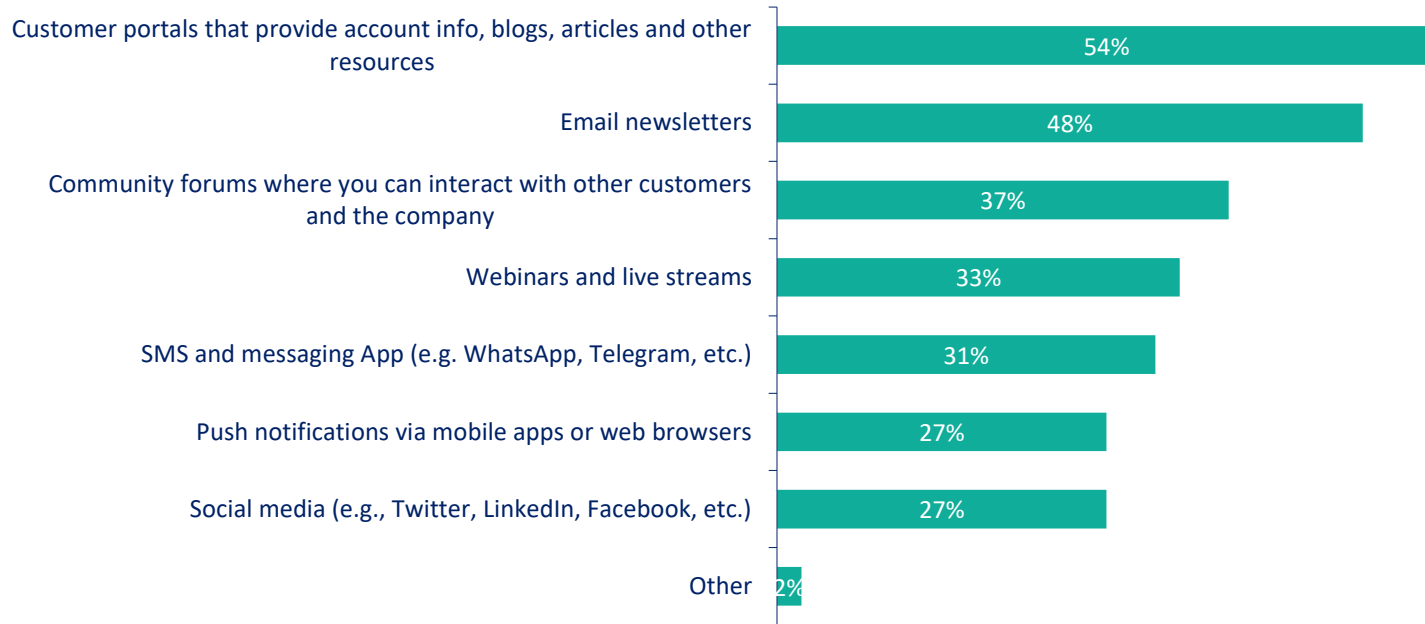
- Directly from the infrastructure vendor's (e.g. Amazon Web Services, Dell, CrowdStrike, etc.) website
- Directly from the infrastructure vendor's (e.g. Amazon Web Services, Dell, CrowdStrike, etc.) through a sales rep (phone or in-person)
- From a third-party value-added reseller, consultant or managed service provider (MSP)
- From a third-party retailer or etailer (e.g., Amazon, BestBuy, Newegg, etc.)
- From a distributor (e.g. Ingram Micro, Tech Data, Synnex, etc.)
- Local computer stores
- Don't know
- Other



35) How does your organization usually purchase servers, storage, networking, security, and other infrastructure solutions (for on premise and/or cloud deployment)?, Sample Size = 738 (Select up to 3 responses)

# Post-Purchase Communication and Service Preferences

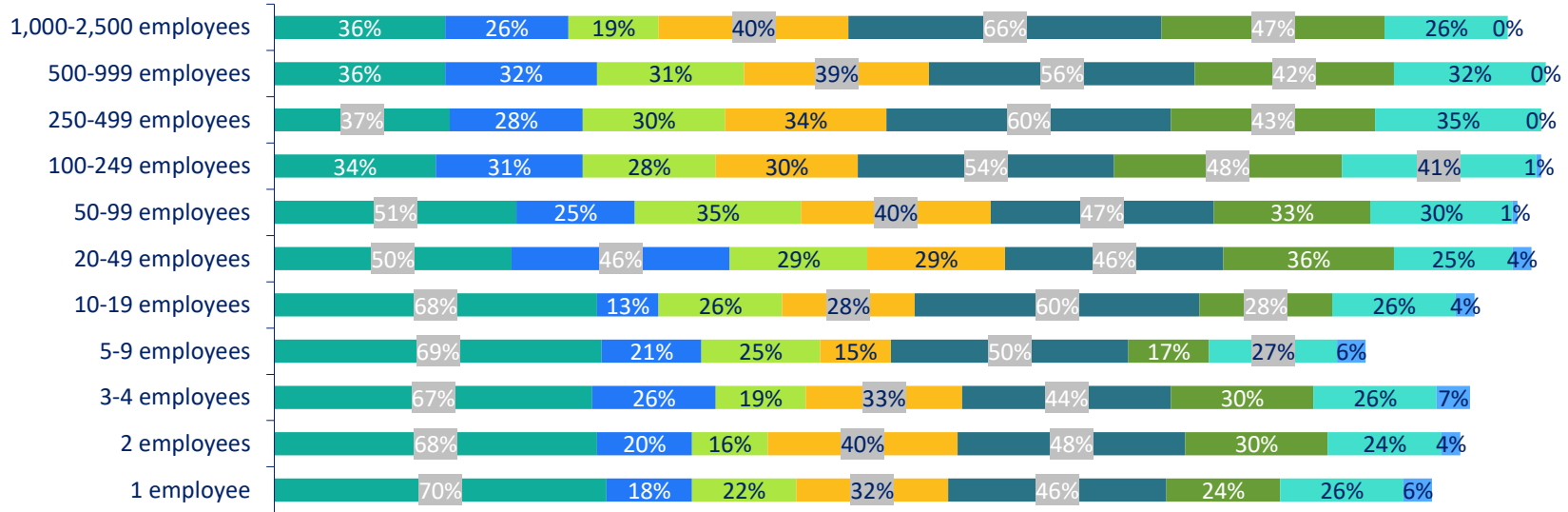
# Preferences for Ongoing Vendor Communications



37) What are the top ways you prefer to receive ongoing communications from technology vendors?, Sample Size = 738 (Select up to 3 responses)

# Preferences for Ongoing Vendor Communications by Employee Size

- Email newsletters
- Push notifications via mobile apps or web browsers
- Customer portals that provide account info, blogs, articles and other resources
- SMS and messaging App (e.g. WhatsApp, Telegram, etc.)
- Social media (e.g., Twitter, LinkedIn, Facebook, etc.)
- Webinars and live streams
- Community forums where you can interact with other customers and the company
- Other



37) What are the top ways you prefer to receive ongoing communications from technology vendors?, Sample Size = 738 (Select up to 3 responses)

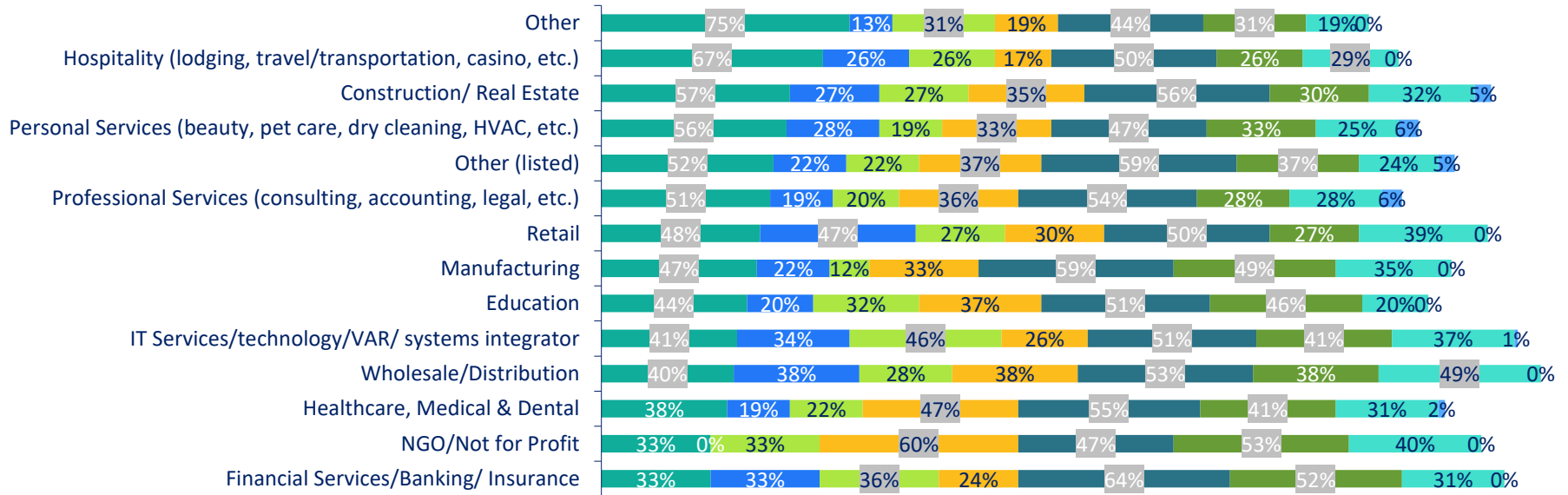
# Preferences for Ongoing Vendor Communications by Employee Size

Employee Size	#1 Preference	#2 Preference	#3 Preference
1,000-2,500	Customer portals (66%)	Community forums (47%)	Webinars and live streams (40%)
500-999	Customer portals (56%)	Community forums (42%)	Webinars and live streams (39%)
250-499	Customer portals (60%)	Community forums (43%)	Email newsletters (37%)
100-249	Customer portals (54%)	Community forums (48%)	SMS and messaging apps (41%)
50-99	Email newsletters (51%)	Customer portals (47%)	Webinars and live streams (40%)
20-49	Email newsletters (50%)	Social media, customer portals (46%)	
10-19	Email newsletters (68%)	Customer portals (60%)	Webinars and live streams, community forums (28%)
5-9	Email newsletters (69%)	Customer portals (50%)	SMS and messaging apps (27%)
3-4	Email newsletters (67%)	Customer portals (44%)	Webinars and live streams (33%)
2	Email newsletters (68%)	Customer portals (48%)	Webinars and live streams (40%)
1	Email newsletters (70%)	Customer portals (46%)	Webinars and live streams (32%)

37) What are the top ways you prefer to receive ongoing communications from technology vendors?, Sample Size = 738 (Select up to 3 responses)

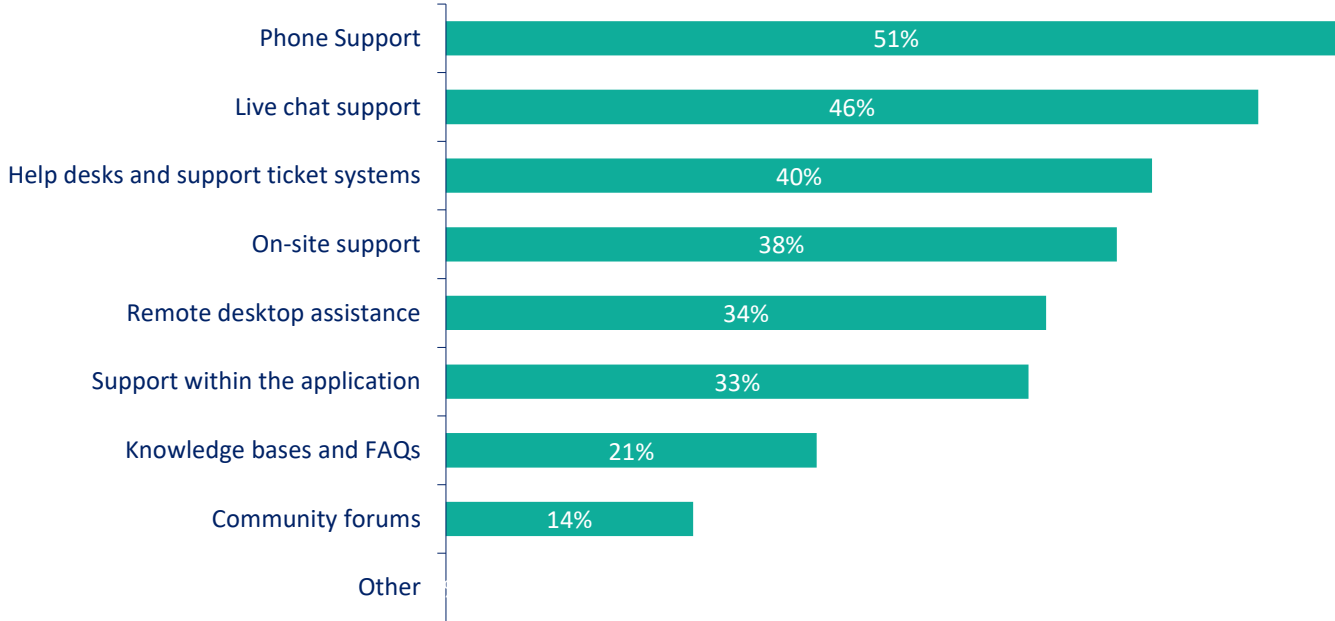
# Preferences for Ongoing Vendor Communications by Industry

- Email newsletters
- Push notifications via mobile apps or web browsers
- Customer portals that provide account info, blogs, articles and other resources
- SMS and messaging App (e.g. WhatsApp, Telegram, etc.)
- Social media (e.g., Twitter, LinkedIn, Facebook, etc.)
- Webinars and live streams
- Community forums where you can interact with other customers and the company
- Other



37) What are the top ways you prefer to receive ongoing communications from technology vendors?, Sample Size = 738 (Select up to 3 responses)

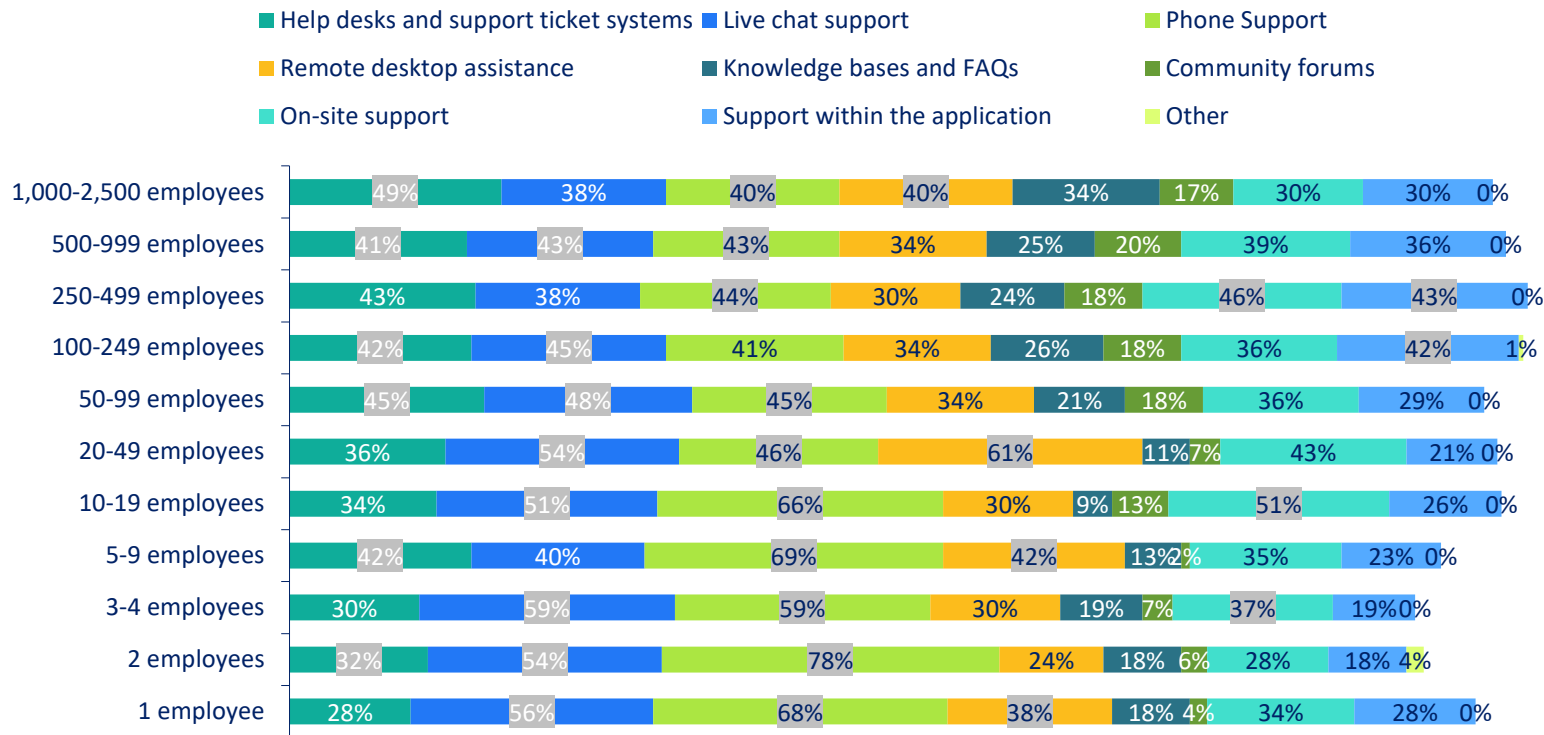
# Preferences for Engaging with Vendors to Resolve Service Issues



38) What are the top ways that you prefer to engage with technology vendors to resolve service issues?, Sample Size = 738 (Select up to 3 responses)



# Preferences for Engaging with Vendors to Resolve Service Issues by Employee Size



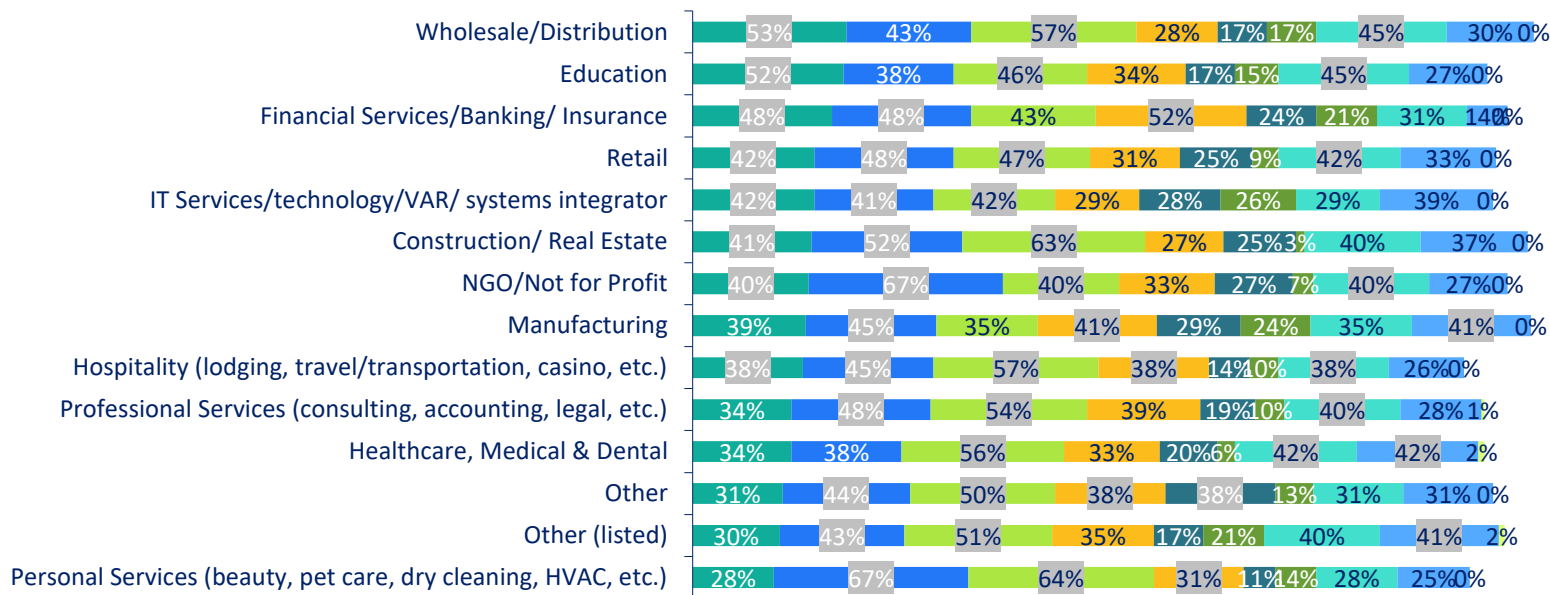
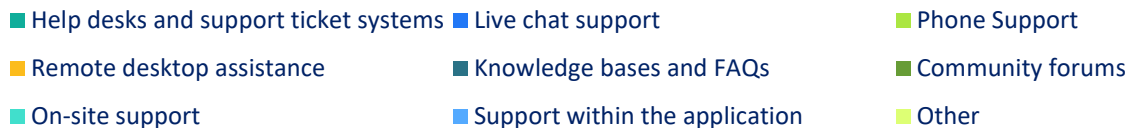
38) What are the top ways that you prefer to engage with technology vendors to resolve service issues?, Sample Size = 738 (Select up to 3 responses)

# Preferences for Engaging with Vendors to Resolve Service Issues by Employee Size

Employee Size	#1 Preference	#2 Preference	#3 Preference
1,000-2,500	Help desks and support ticket systems (49%)	Phone support, Remote desktop assistance (40%)	
500-999	Live chat support, Phone support (43%)		Help desks and support ticket systems (41%)
250-499	On-site support (46%)	Phone support (44%)	Support within application (43%)
100-249	Live chat support (45%)	Help desks and support ticket systems, support within application (42%)	
50-99	Live chat support (48%)	Help desks and support ticket systems, phone support (45%)	
20-49	Remote desktop assistance (61%)	Live chat support (54%)	Phone support (46%)
10-19	Phone support (66%)	Live chat support, support within application (51%)	
5-9	Phone support (69%)	Help desks and support ticket systems, remote desktop assistance (42%)	
3-4	Phone support, live chat support (59%)		On-site support (37%)
2	Phone support (78%)	Live chat support (54%)	Help desks and support ticket systems (32%)
1	Phone support (68%)	Live chat support (56%)	Remote desktop assistance (38%)

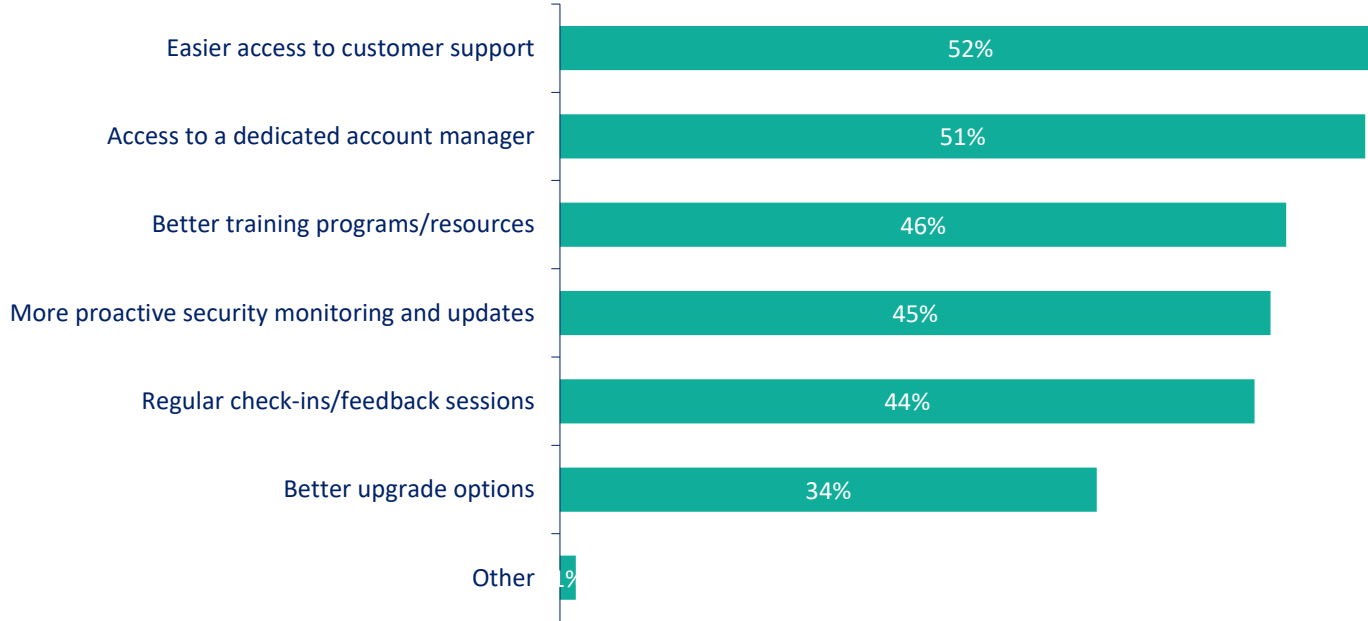
38) What are the top ways that you prefer to engage with technology vendors to resolve service issues?, Sample Size = 738 (Select up to 3 responses)

# Preferences for Engaging with Vendors to Resolve Service Issues by Industry



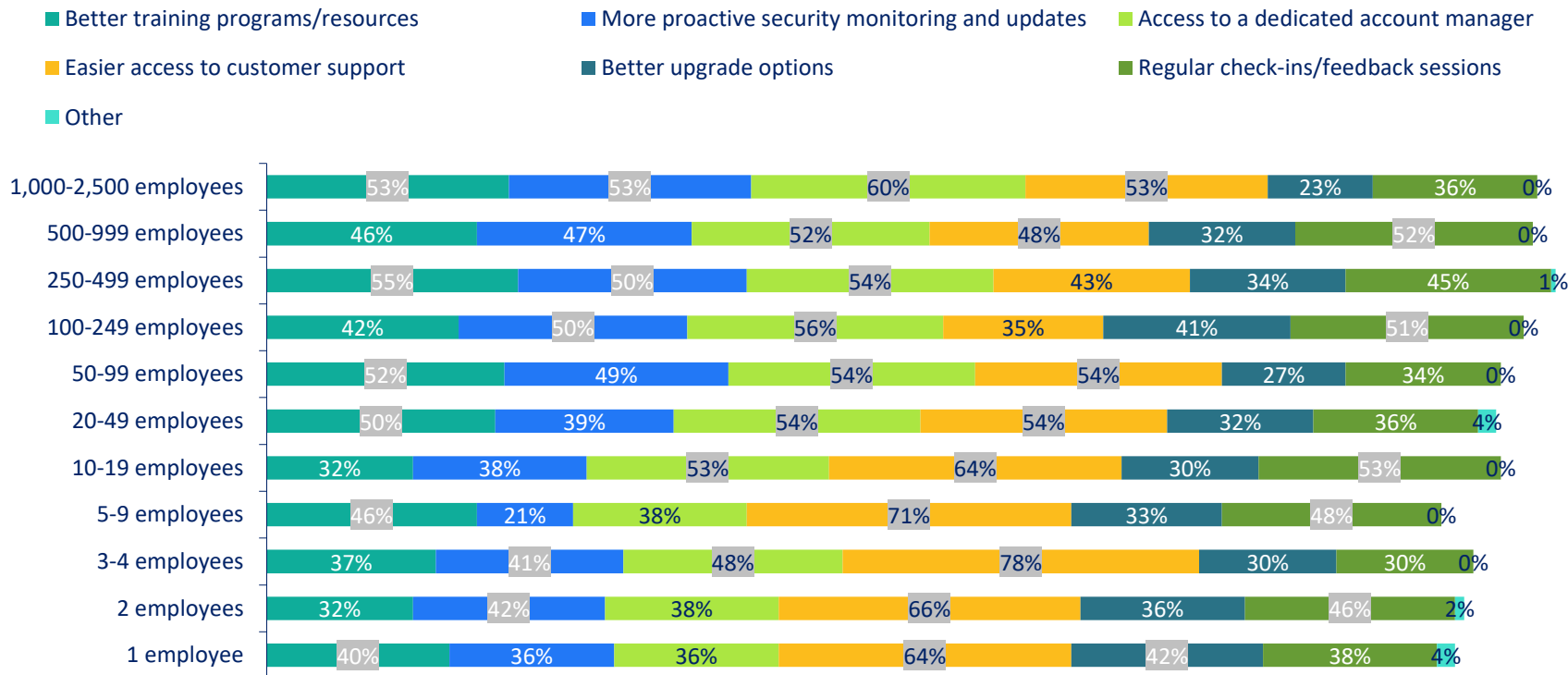
38) What are the top ways that you prefer to engage with technology vendors to resolve service issues?, Sample Size = 738 (Select up to 3 responses)

# Ways Vendors Can Better Support SMBs Post-Implementation



39) What are the top ways technology vendors can better support your organization post-implementation to ensure ongoing satisfaction?  
Sample Size = 738 (Select up to 3 responses)

# Ways Vendors Can Better Support SMBs Post-Implementation by Employee Size



39) What are the top ways technology vendors can better support your organization post-implementation to ensure ongoing satisfaction?

Sample Size = 738 (Select up to 3 responses)

# Ways Vendors Can Better Support SMBs Post-Implementation by Employee Size

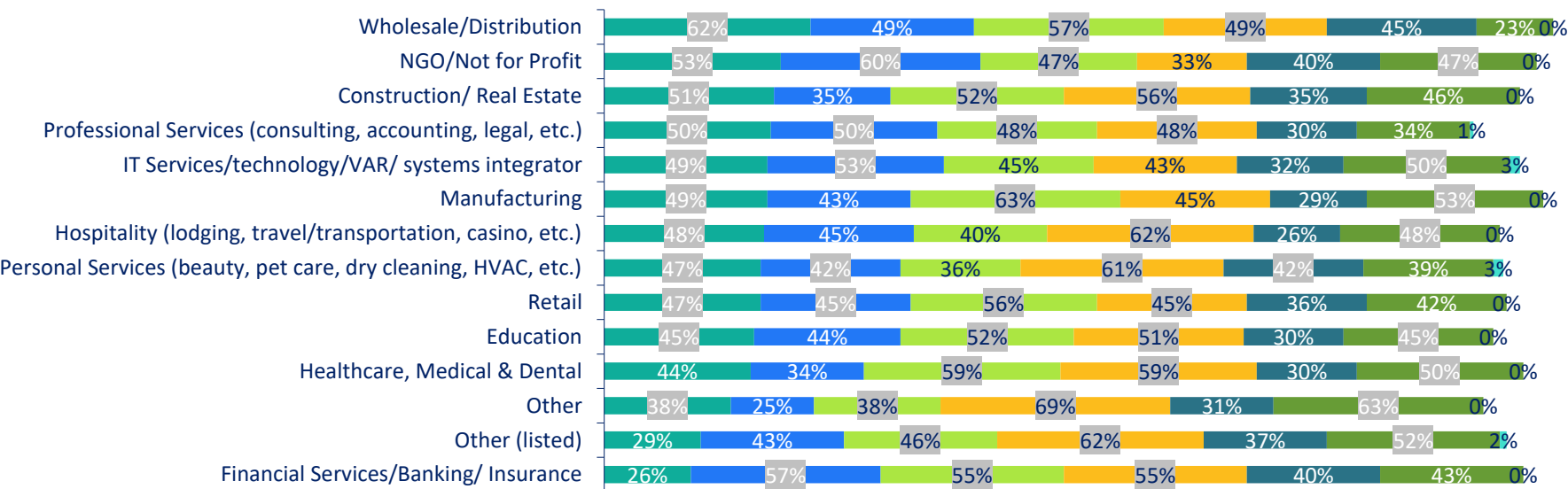
Employee Size	#1 Way to Provide Better Support	#2 Way to Provide Better Support	#3 Way to Provide Better Support
1,000-2,500	Dedicated account manager (60%)	Better training, proactive security monitoring and updates, easier access to customer support (53%)	
500-999	Dedicated account manager, regular check-ins (52%)		Easier access to customer support (48%)
250-499	Better training (55%)	Dedicated account manager (54%)	Proactive security monitoring and updates (50%)
100-249	Dedicated account manager (56%)	Regular check-ins (51%)	Proactive security monitoring and updates (50%)
50-99	Dedicated account manager, easier access to customer support (54%)		Better training (52%)
20-49	Dedicated account manager, easier access to customer support (54%)		Better training (50%)
10-19	Easier access to customer support (64%)	Dedicated account manager, regular check-ins (53%)	
5-9	Easier access to customer support (71%)	Regular check-ins (48%)	Better training (46%)
3-4	Easier access to customer support (78%)	Dedicated account manager (48%)	Proactive security monitoring and updates (41%)
2	Easier access to customer support (66%)	Regular check-ins (46%)	Proactive security monitoring and updates (42%)
1	Easier access to customer support (64%)	Better upgrade options (42%)	Better training (40%)

39) What are the top ways technology vendors can better support your organization post-implementation to ensure ongoing satisfaction?

Sample Size = 738 (Select up to 3 responses)

# Ways Vendors Can Better Support SMBs Post-Implementation by Industry

- Better training programs/resources
- Easier access to customer support
- Other
- More proactive security monitoring and updates
- Better upgrade options
- Access to a dedicated account manager
- Regular check-ins/feedback sessions



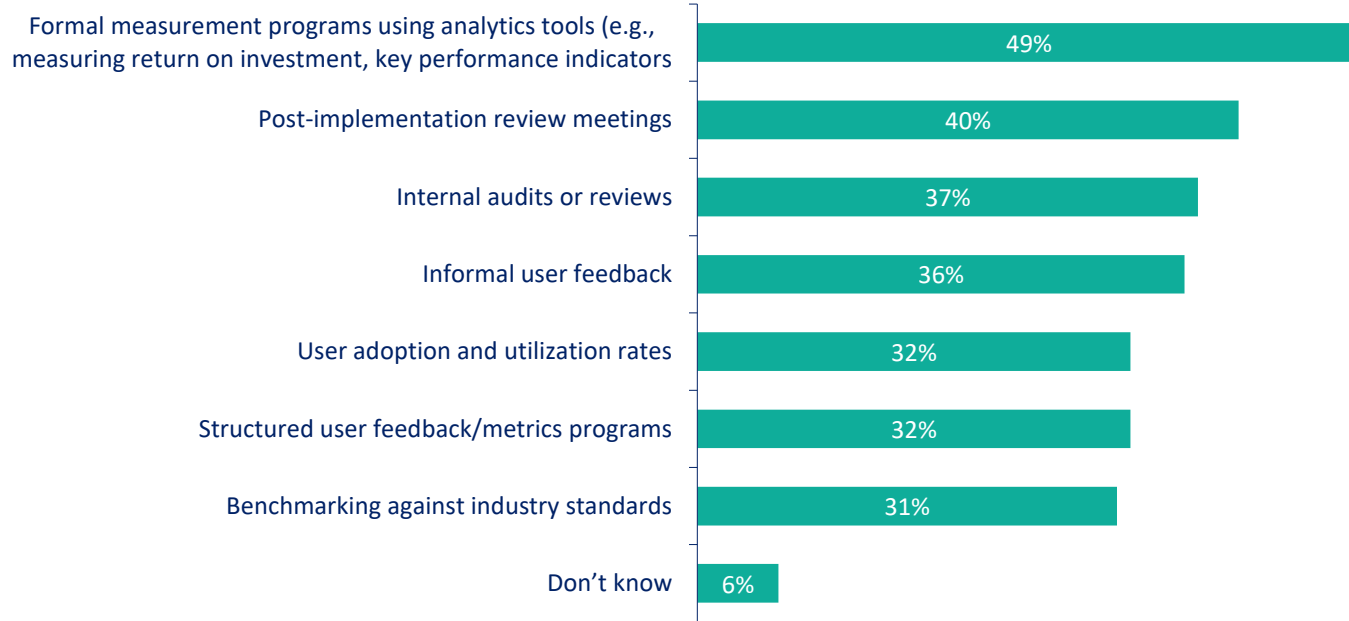
39) What are the top ways technology vendors can better support your organization post-implementation to ensure ongoing satisfaction?

Sample Size = 738 (Select up to 3 responses)

# Methods and Metrics to Gauge Success

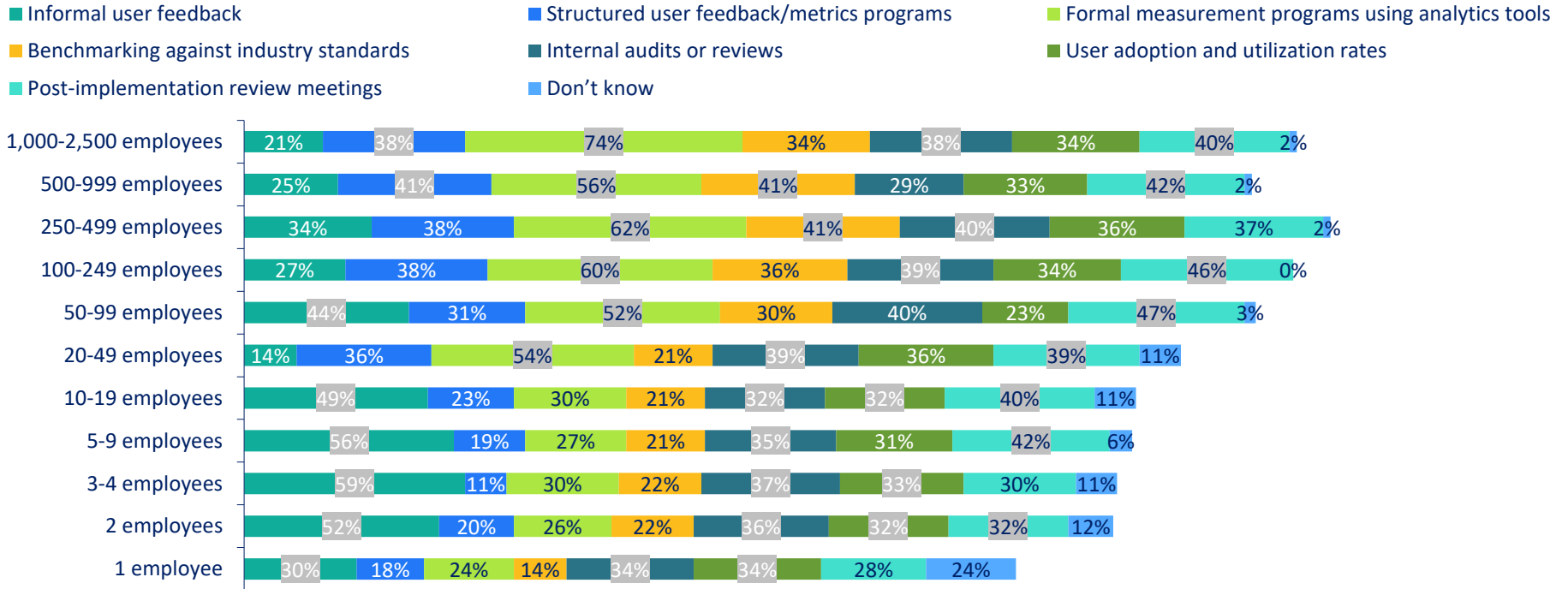


# Methods SMBs Use to Assess the Success of New Technology Solutions



40) What methods does your organization use to assess the success or impact of a new technology solution within your organization?  
Sample Size = 738 (Select all that apply)

# Methods SMBs Use to Assess the Success of New Technology Solutions by Employee Size



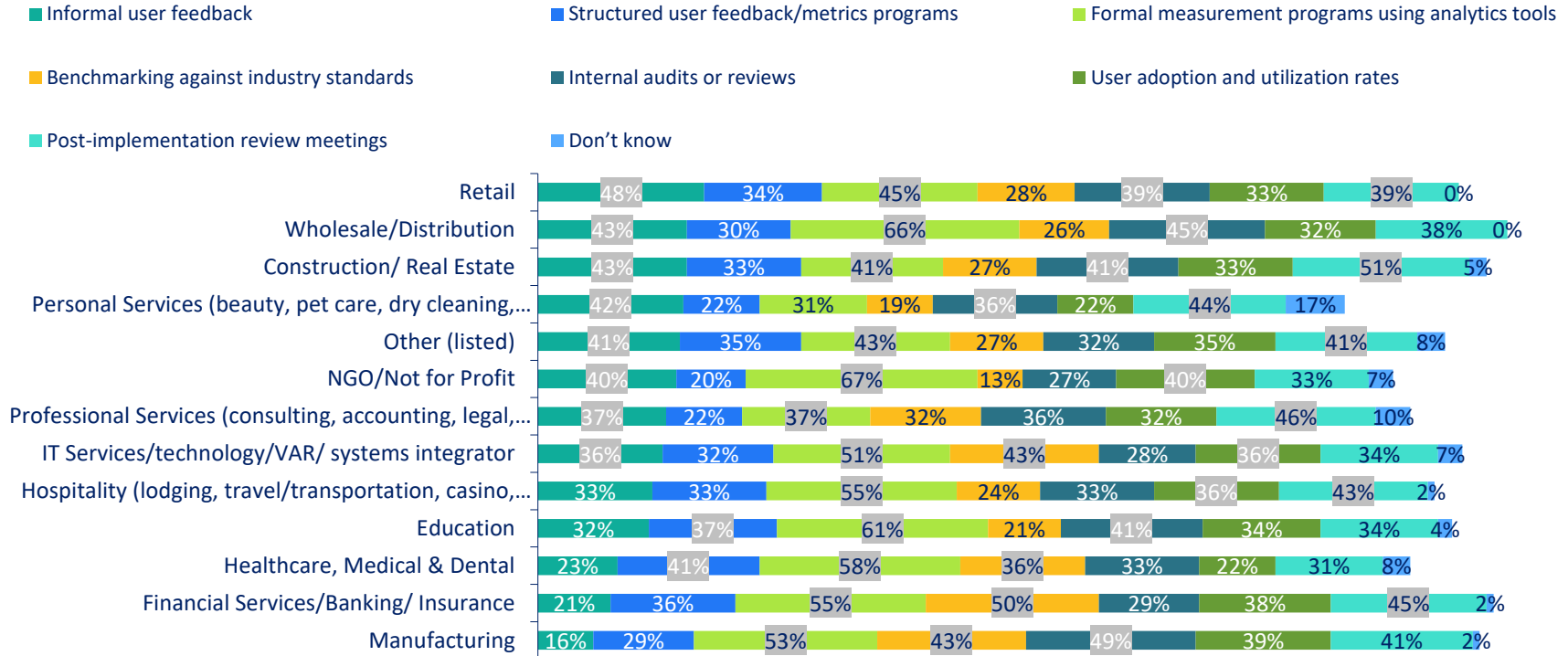
40) What methods does your organization use to assess the success or impact of a new technology solution within your organization?  
 Sample Size = 738 (Select all that apply)

# Methods SMBs Use to Assess the Success of New Technology Solutions by Employee Size

Employee Size	#1 Method	#2 Method	#3 Method
1,000-2,500	Formal measurement programs using analytics tools (74%)	Post-implementation review meetings (40%)	Structured user feedback programs, internal audits (38%)
500-999	Formal measurement programs using analytics tools (56%)	Post-implementation review meetings (42%)	Structured user feedback programs, benchmarking against industry standards (41%)
250-499	Formal measurement programs using analytics tools (62%)	Benchmarking against industry standards (41%)	Internal audits (40%)
100-249	Formal measurement programs using analytics tools (60%)	Post-implementation review meetings (46%)	Internal audits (39%)
50-99	Formal measurement programs using analytics tools (52%)	Post-implementation review meetings (47%)	Informal user feedback (44%)
20-49	Formal measurement programs using analytics tools (54%)	Post-implementation review meetings, internal audits (39%)	
10-19	Informal user feedback (49%)	Post-implementation review meetings (40%)	User adoption and utilization rates, internal audits (32%)
5-9	Informal user feedback (56%)	Post-implementation review meetings (42%)	Internal audits (35%)
3-4	Informal user feedback (59%)	Internal audits (37%)	User adoption or utilization rates (33%)
2	Informal user feedback (52%)	Internal audits (36%)	User adoption or utilization rates, post-implementation review meetings (32%)
1	Internal audits, user adoption and utilization rates (34%)		Informal user feedback (30%)

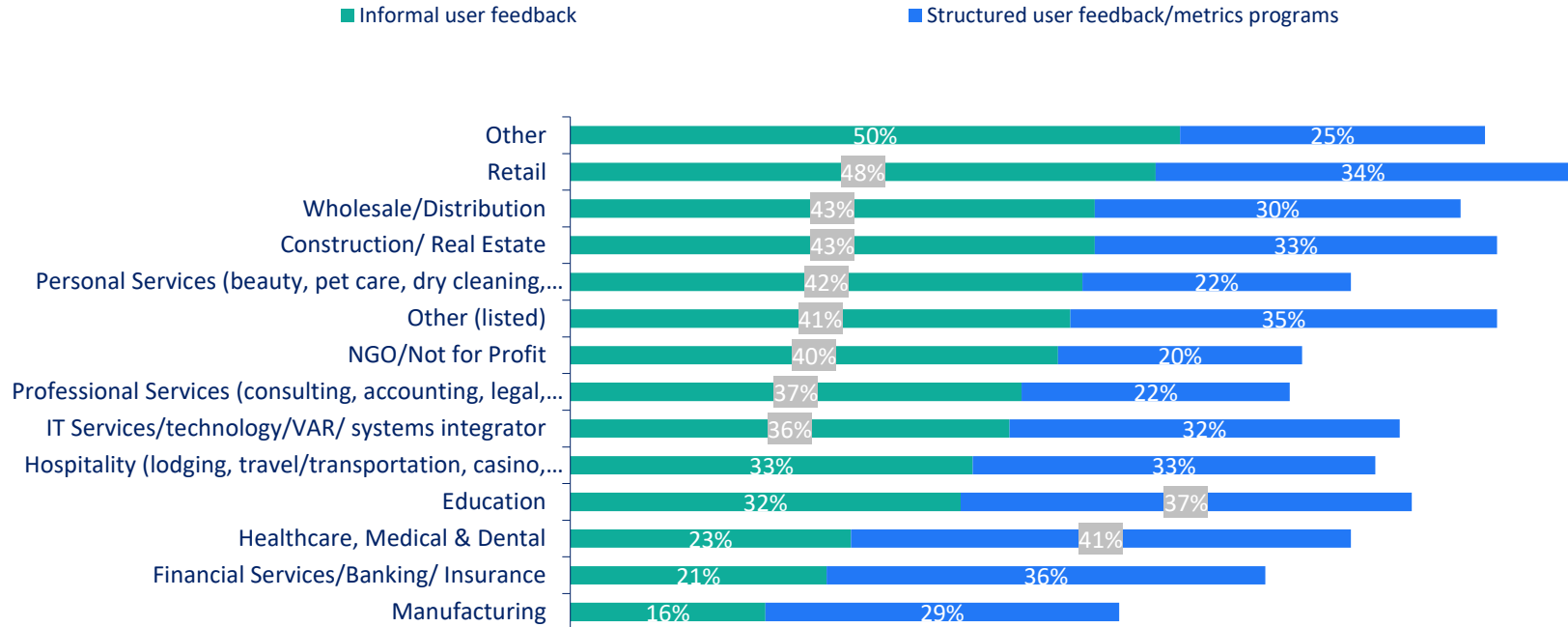
40) What methods does your organization use to assess the success or impact of a new technology solution within your organization?  
Sample Size = 738 (Select all that apply)

# Methods SMBs Use to Assess the Success of New Technology Solutions by Industry



40) What methods does your organization use to assess the success or impact of a new technology solution within your organization?  
 Sample Size = 738 (Select all that apply)

# Methods SMBs Use to Assess the Success of New Technology Solutions by Industry



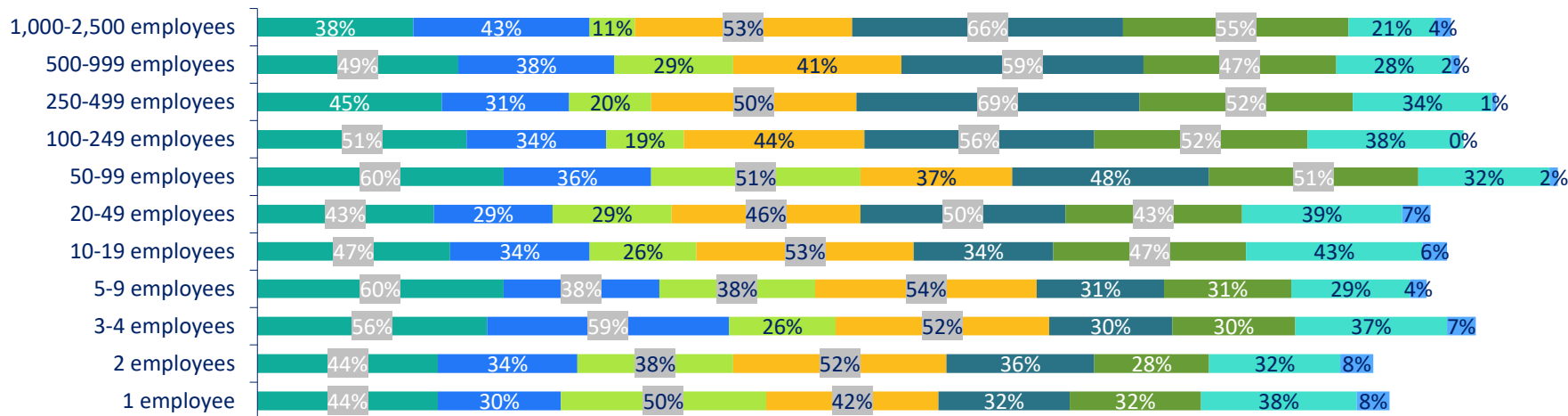
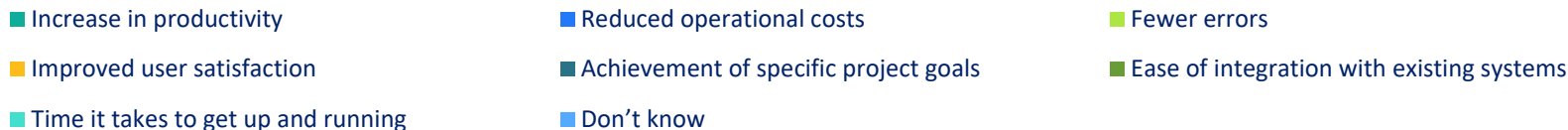
40) What methods does your organization use to assess the success or impact of a new technology solution within your organization?  
Sample Size = 738 (Select all that apply)

# Metrics SMBs Use to Measure How Well a New Technology Solution Works



41) What metrics does your organization typically use to measure how well a new technology solution is working for your organization?  
Sample Size = 738 (Select all that apply)

# Metrics SMBs Use to Measure How Well a New Technology Solution Works by Employee Size



41) What metrics does your organization typically use to measure how well a new technology solution is working for your organization?  
 Sample Size = 738 (Select all that apply)

# Metrics SMBs Use to Measure How Well a New Technology Solution Works by Employee Size

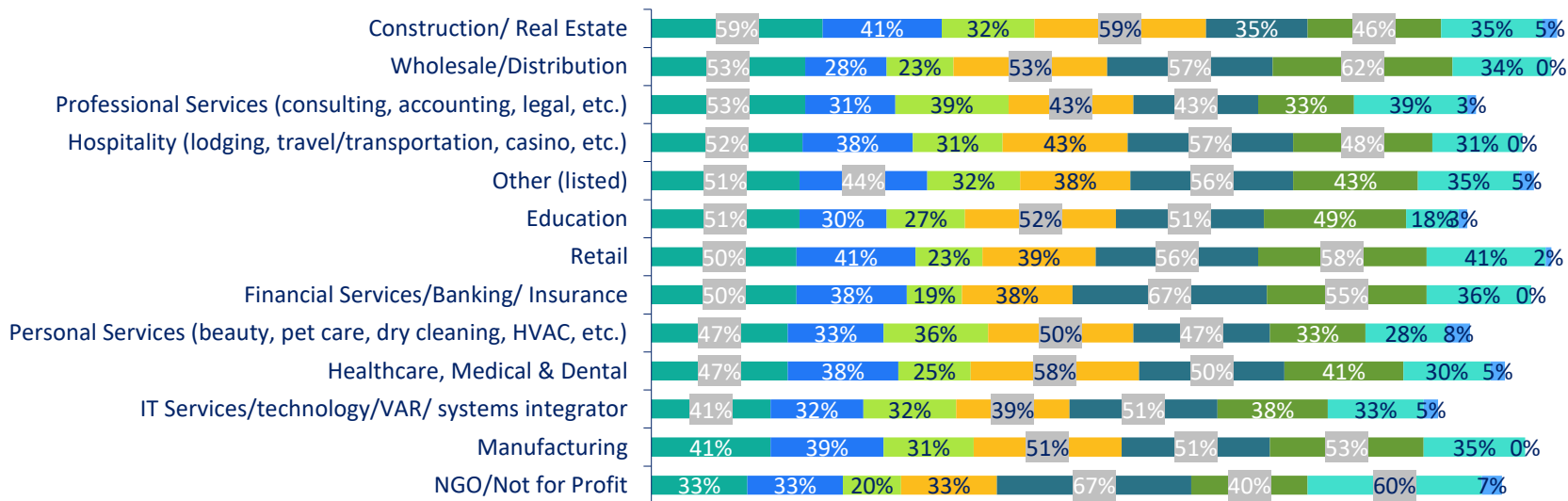
Employee Size	#1 Metric	#2 Metric	#3 Metric
1,000-2,500	Achievement of specific project goals (66%)	Ease of integration (55%)	Improved user satisfaction (53%)
500-999	Achievement of specific project goals (59%)	Increase in productivity (49%)	Ease of integration (47%)
250-499	Achievement of specific project goals (69%)	Ease of integration (52%)	Improved user satisfaction (50%)
100-249	Achievement of specific project goals (56%)	Ease of integration (52%)	Increase in productivity (51%)
50-99	Increase in productivity (60%)	Fewer errors, ease of integration (51%)	
20-49	Achievement of specific project goals (50%)	Improved user satisfaction (46%)	Increase in productivity, ease of integration (43%)
10-19	Improve user satisfaction (53%)	Increase in productivity, ease of integration (47%)	
5-9	Increase in productivity (60%)	Improved user satisfaction (54%)	Reduced operational costs, fewer errors (38%)
3-4	Reduced operational costs (59%)	Increase in productivity (56%)	Improved user satisfaction (52%)
2	Improved user satisfaction (52%)	Increase in productivity (44%)	Fewer errors (38%)
1	Fewer errors (50%)	Increase in productivity (44%)	Improved user satisfaction (42%)

41) What metrics does your organization typically use to measure how well a new technology solution is working for your organization?  
Sample Size = 738 (Select all that apply)



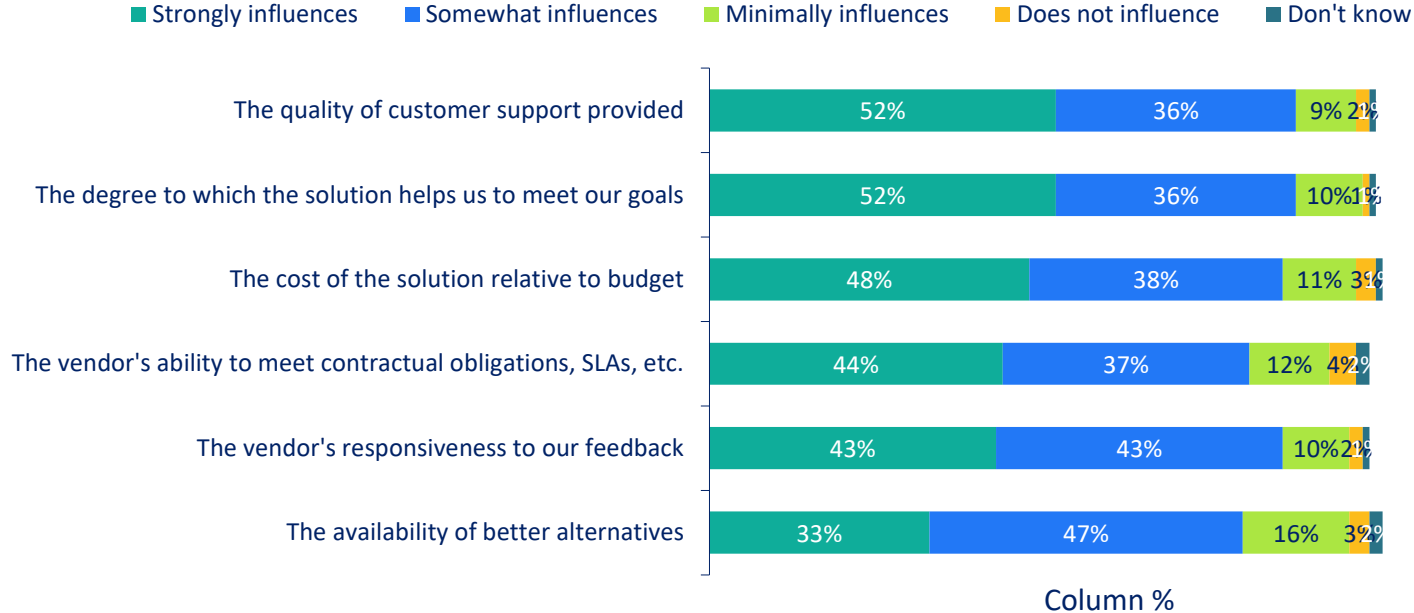
# Metrics SMBs Use to Measure How Well a New Technology Solution Works by Industry

- Increase in productivity
- Reduced operational costs
- Fewer errors
- Improved user satisfaction
- Achievement of specific project goals
- Ease of integration with existing systems
- Time it takes to get up and running
- Don't know



41) What metrics does your organization typically use to measure how well a new technology solution is working for your organization?  
 Sample Size = 738 (Select all that apply)

# Factors Influencing Contract Renewal/Termination Decisions with Technology Vendors



42) To what extent do the following factors influence your organization's decision to renew or terminate a contract with a technology vendor? Strongly influences , Sample Size = 738

# Factors “Strongly” Influencing Contract Renewal/Termination Decisions with Technology Vendors

## Strongly Influences

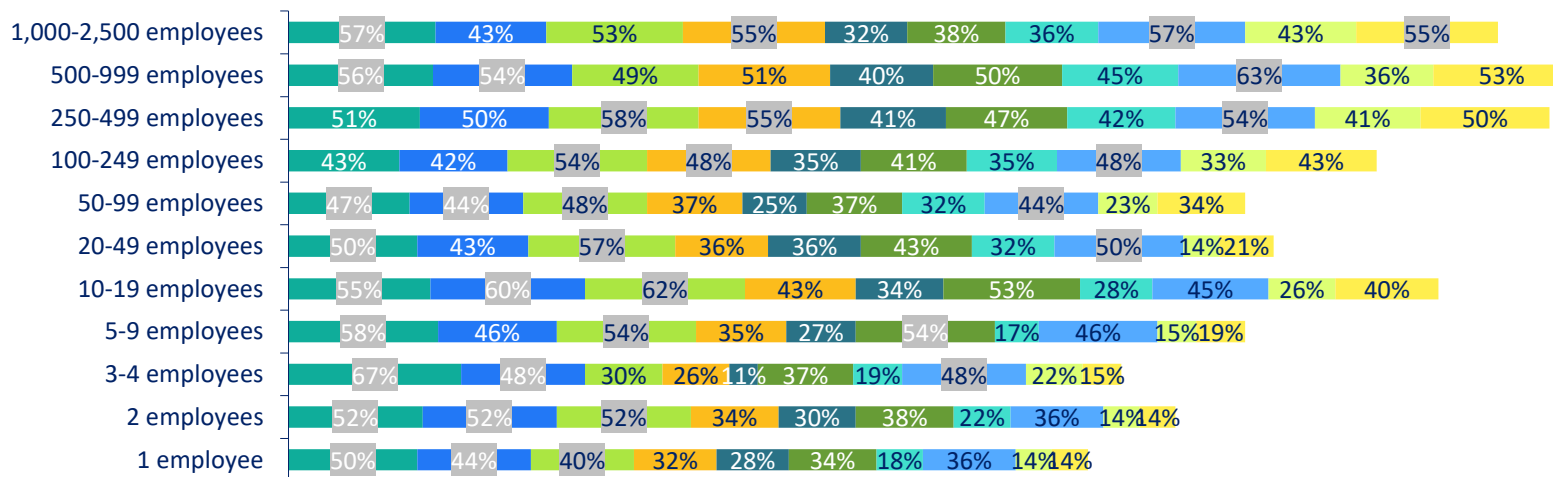


42) To what extent do the following factors influence your organization's decision to renew or terminate a contract with a technology vendor? Strongly influences  
Sample Size = 738

# Factors “Strongly” Influencing Contract Renewal/Termination Decisions with Technology Vendors by Employee Size

## Strongly Influence

- The degree to which the solution helps us to meet our goals
- The cost of the solution relative to budget
- The quality of customer support provided
- The vendor's ability to meet contractual obligations, SLAs, etc.
- The availability of better alternatives
- The vendor's responsiveness to our feedback
- The vendor's ability to innovate
- The vendor's adherence to security standards
- The alignment of vendor values and ethics with our own
- The solution's ability to scale as we grow



42) To what extent do the following factors influence your organization’s decision to renew or terminate a contract with a technology vendor? Strongly influence, Sample Size = 738

# Factors “Strongly” Influencing Contract Renewal/Termination Decisions with Technology Vendors by Employee Size

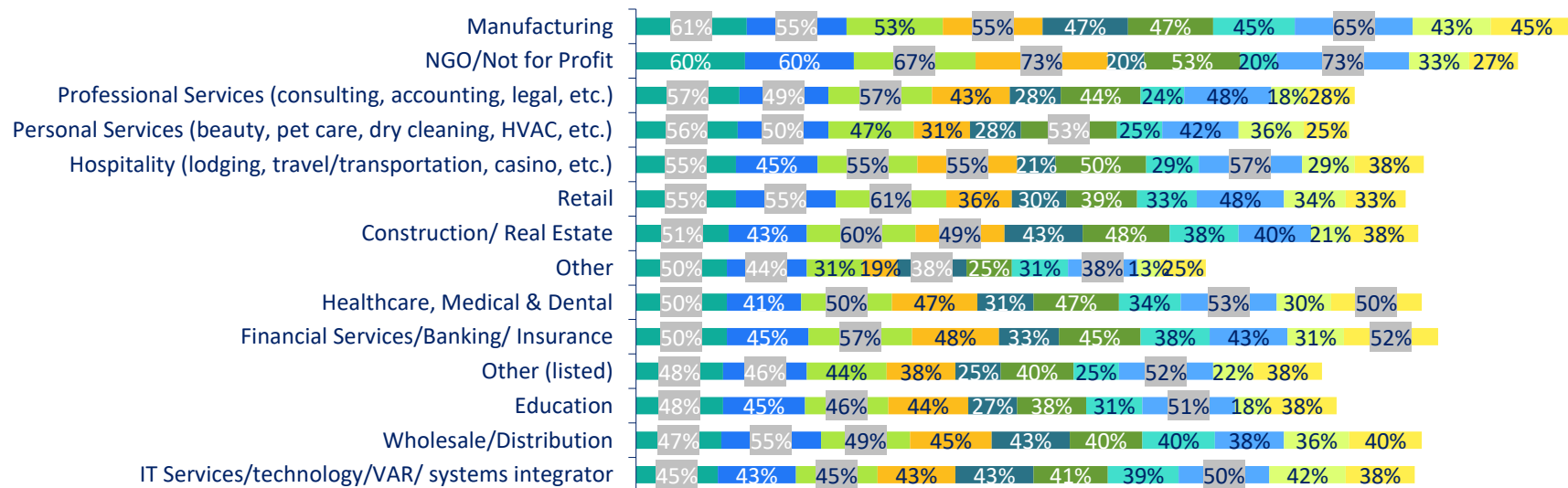
Employee Size	#1 Influence	#2 Influence	#3 Influence
1,000-2,500	The degree to which the solution helps us meet our goals, vendor’s adherence to security standards (57%)		The solution’s ability to scale, vendor’s ability to meet contractual obligations (55%)
500-999	Vendor’s adherence to security standards (63%)	The degree to which the solution helps us meet our goals (56%)	Cost of the solution relative to budget (54%)
250-499	Quality of customer support provided (58%)	Vendor’s ability to meet contractual obligations (55%)	Vendor’s adherence to security standards (54%)
100-249	Quality of customer support provided (54%)	Vendor’s ability to meet contractual obligations, vendor’s adherence to security standards (48%)	
50-99	Quality of customer support provided (48%)	The degree to which the solution helps us meet our goals (47%)	Cost of the solution relative to budget, vendor’s adherence to security standards (44%)
20-49	Quality of customer support provided (57%)	The degree to which the solution helps us meet our goals, vendor’s adherence to security standards (50%)	
10-19	Quality of customer support provided (62%)	Cost of the solution relative to budget (60%)	The degree to which the solution helps us meet our goals (55%)
5-9	The degree to which the solution helps us meet our goals (58%)	Quality of customer support, vendor’s responsiveness to feedback (54%)	
3-4	The degree to which the solution helps us meet our goals (67%)	Cost of the solution relative to budget, vendor’s adherence to security standards (48%)	
2	The degree to which the solutions helps us meet our goals, cost of the solution relative to budget, quality of customer support (52%)		
1	The degree to which the solution helps us meet our goals (50%)	Cost of the solution relative to budget (44%)	Quality of customer support (40%)

42) To what extent do the following factors influence your organization’s decision to renew or terminate a contract with a technology vendor? Strongly influence, Sample Size = 738

# Factors “Strongly” Influencing Contract Renewal/Termination Decisions with Technology Vendors by Industry

## Strongly Influence

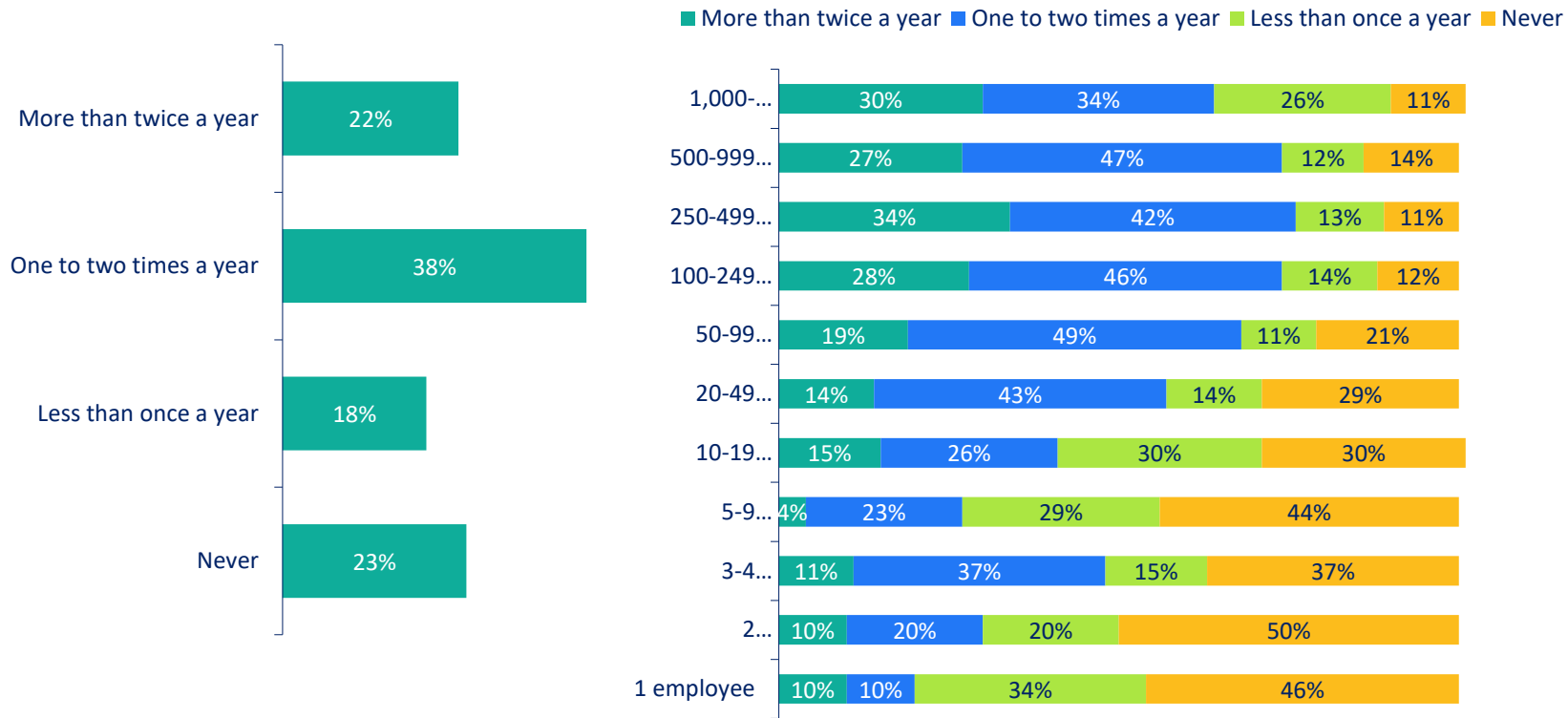
- The degree to which the solution helps us to meet our goals
- The cost of the solution relative to budget
- The quality of customer support provided
- The vendor's ability to meet contractual obligations, SLAs, etc.
- The availability of better alternatives
- The vendor's responsiveness to our feedback
- The vendor's ability to innovate
- The vendor's adherence to security standards
- The alignment of vendor values and ethics with our own
- The solution's ability to scale as we grow



42) To what extent do the following factors influence your organization’s decision to renew or terminate a contract with a technology vendor? strongly infl., Sample

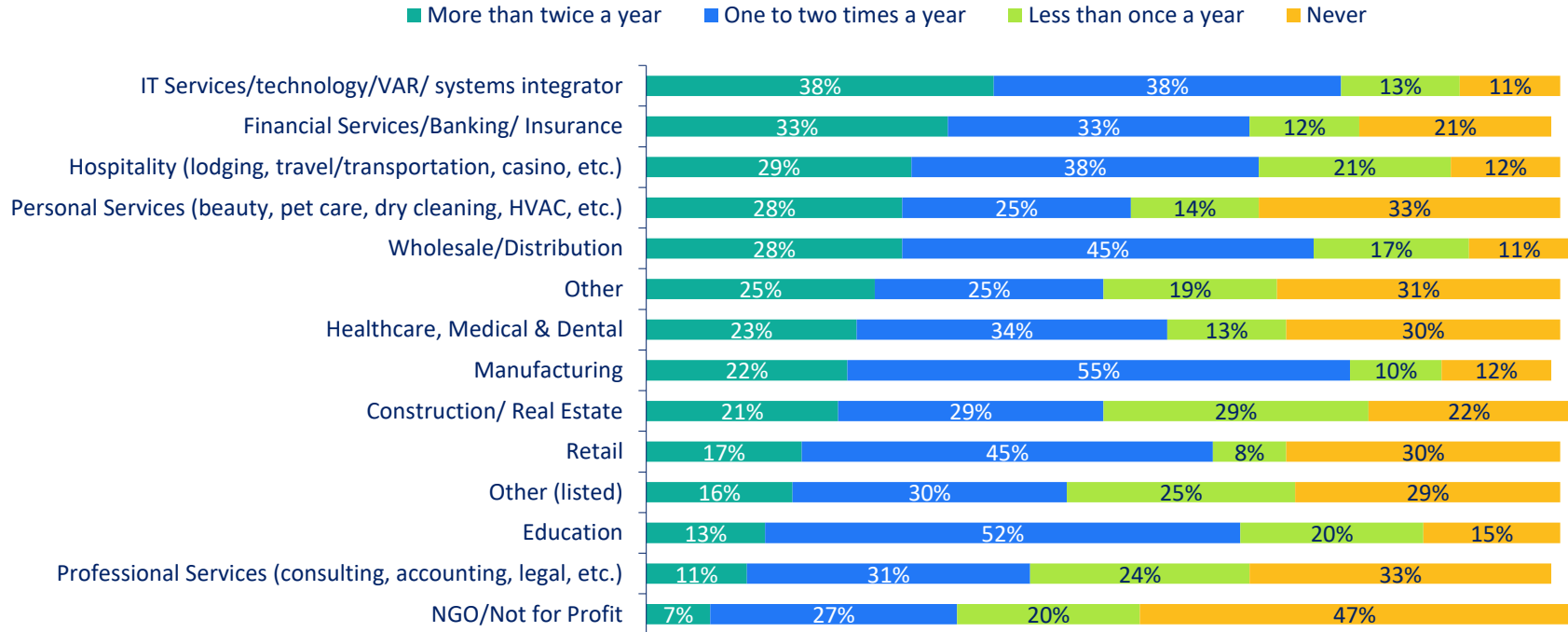
Size = 738

# Frequency of Posting Reviews/Rating of Technology Solutions on Online Forums



43) How often do you post reviews/ratings of technology solutions on online forums? Sample Size = 738

# Frequency of Posting Reviews/Rating of Technology Solutions on Online Forums by Industry

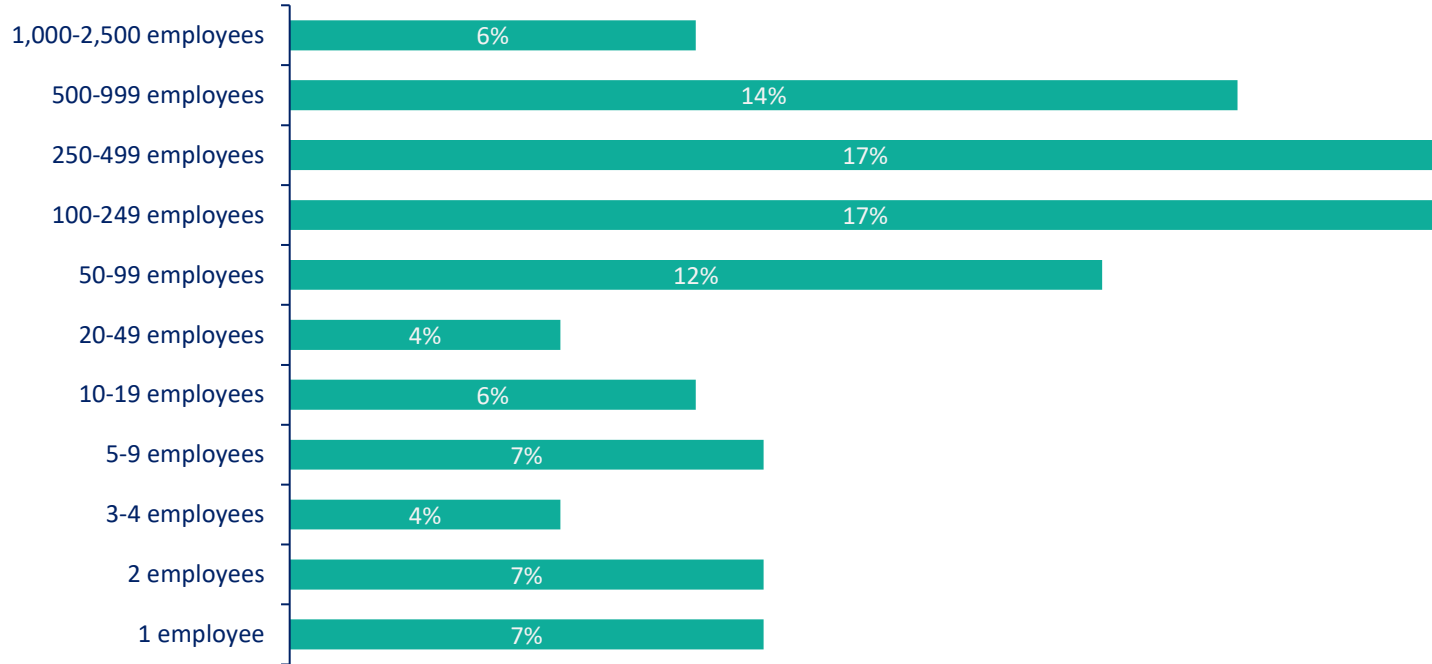


43) How often do you post reviews/ratings of technology solutions on online forums?, Sample Size = 738



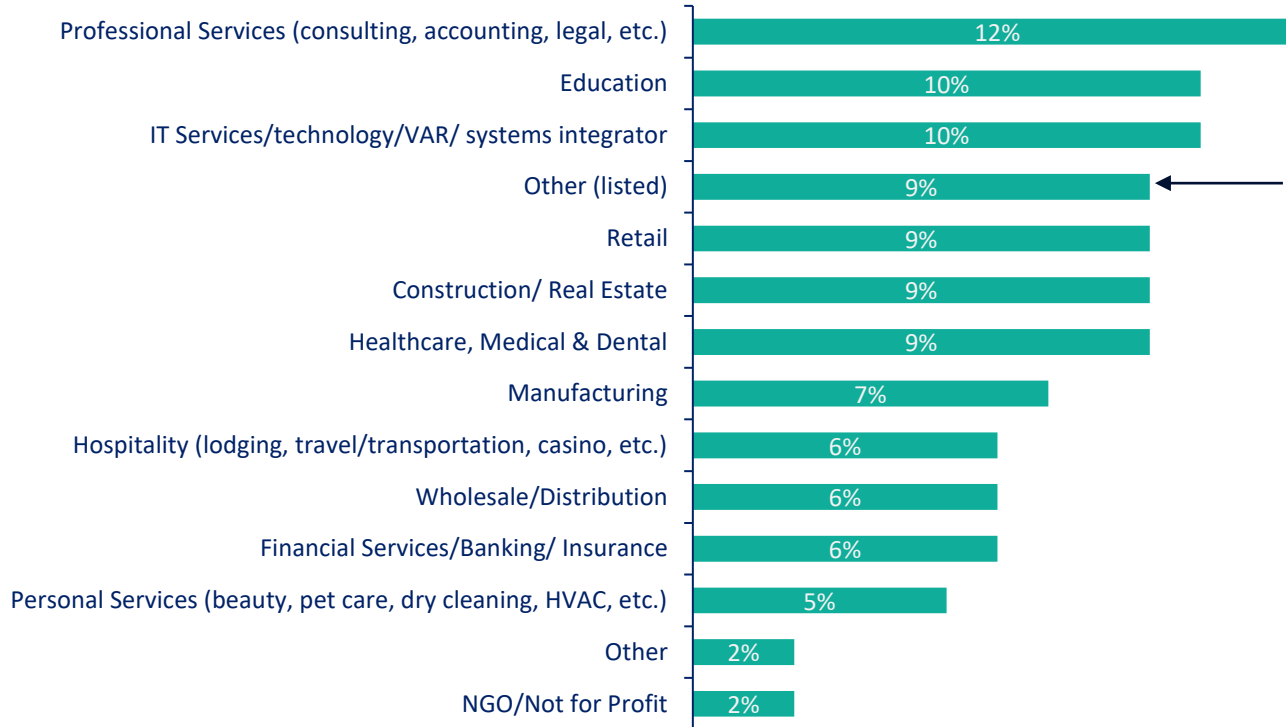
# Demographics

# Employee Size Distribution



3) How many full-time employees, including yourself, work in your organization (not including external contractors)?, Sample Size = 738

# Industry Distribution



*Note: Sample sizes were low for some industries specifically listed on the survey. These are grouped together in “Other (listed)”:*

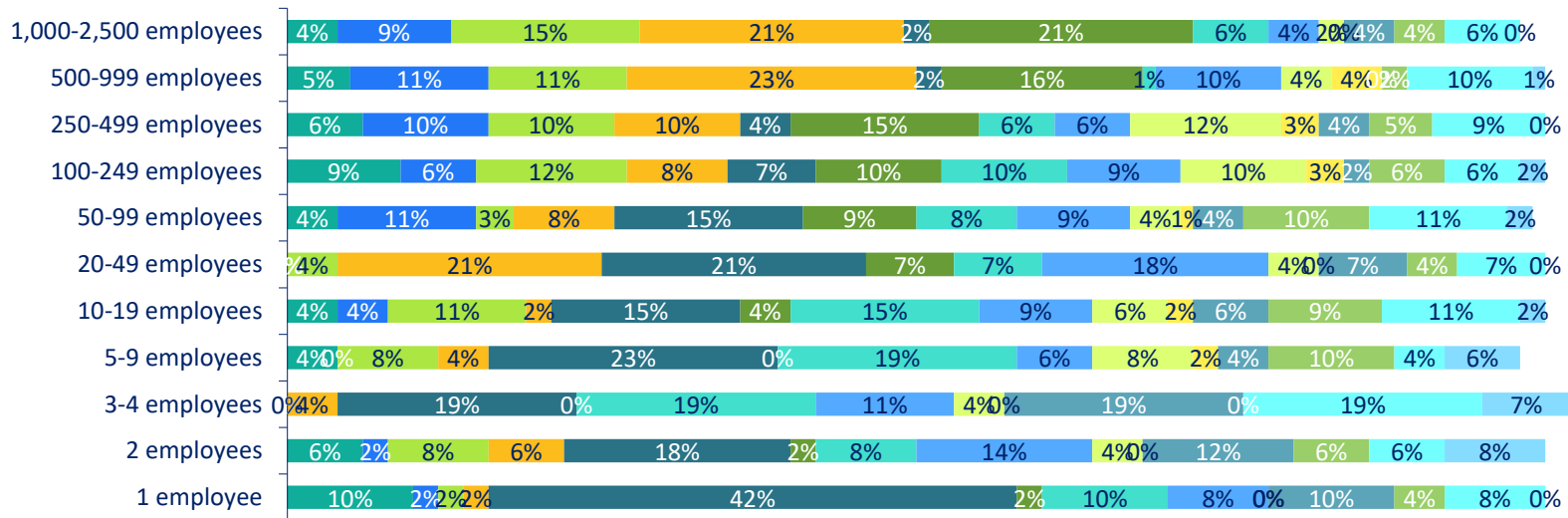
**Total respondents for “Other (listed): 63**

- Utilities/Communications/Telecom: 7
- Mining: 4
- Agriculture: 13
- Independent Software Vendor (ISV)/Developer: 8
- Government (federal and state): 13
- Life Science: 6
- Media: 12

4) Which of the following best describes the industry in which your organization operates?, Sample Size = 738

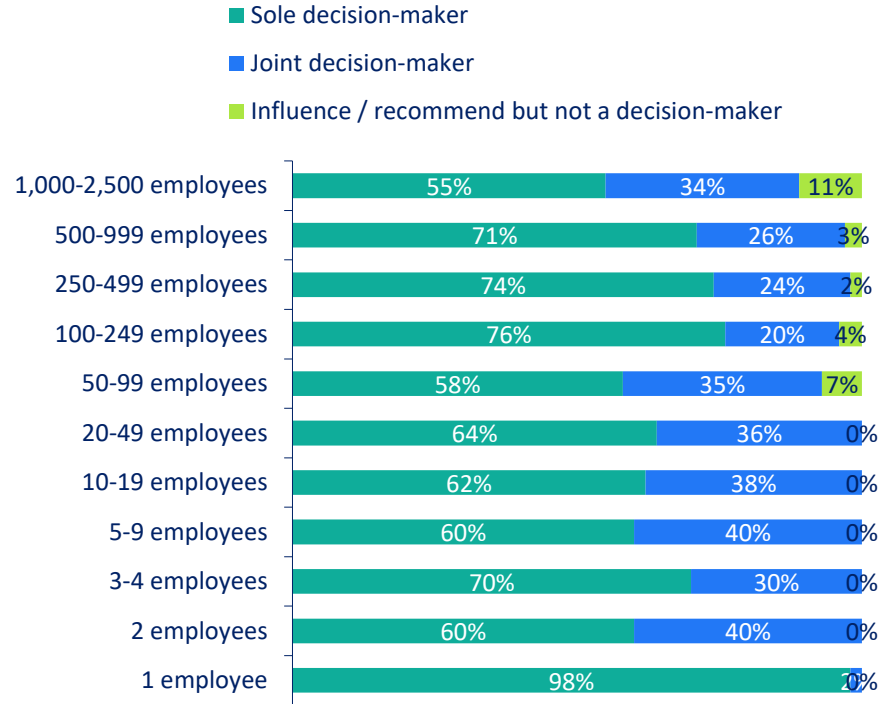
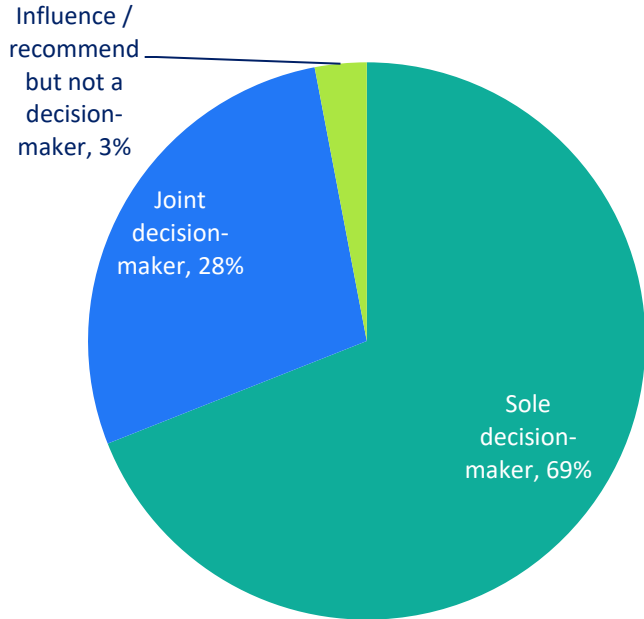
# Industry Distribution by Employee Size

- Financial Services/Banking/ Insurance
- Manufacturing
- Healthcare, Medical & Dental
- IT Services/technology/VAR/ systems integrator
- Professional Services (consulting, accounting, legal, etc.)
- Education
- Construction/ Real Estate
- Retail
- Wholesale/Distribution
- NGO/Not for Profit
- Personal Services (beauty, pet care, dry cleaning, HVAC, etc.)
- Hospitality (lodging, travel/transportation, casino, etc.)
- Other (listed)
- Other



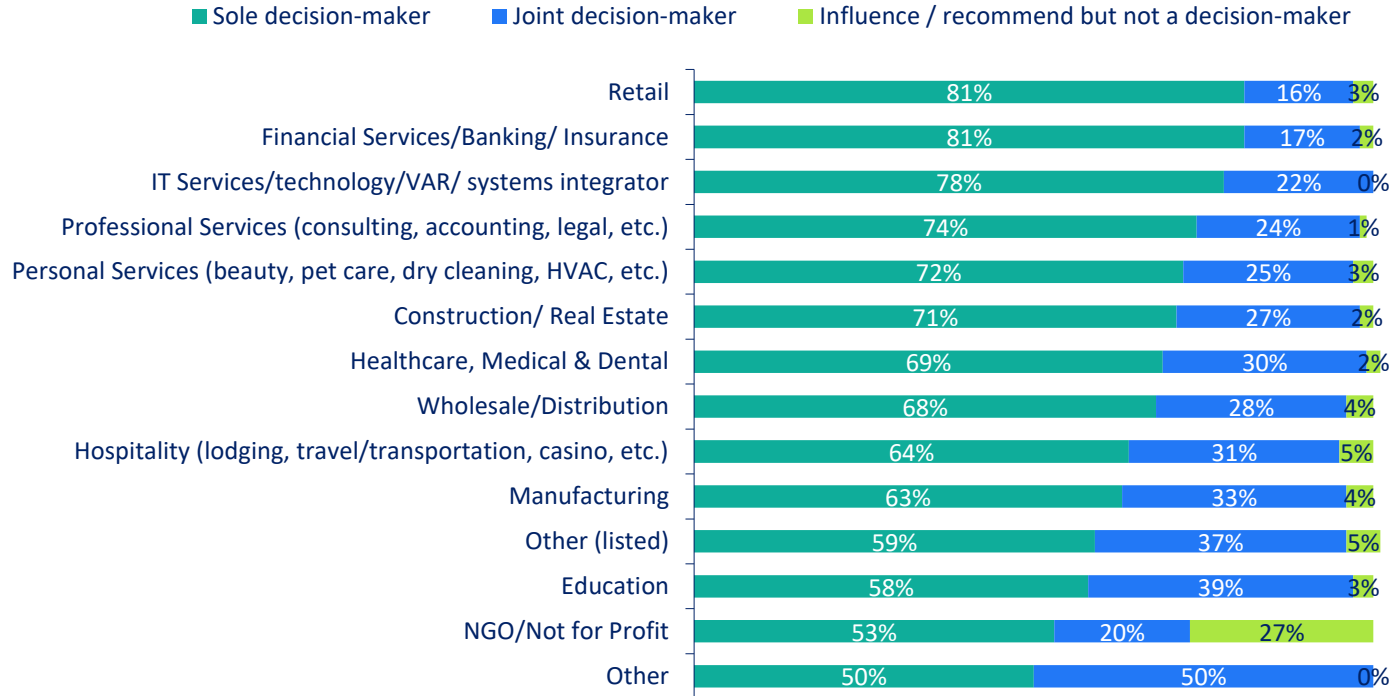
4) Which of the following best describes the industry in which your organization operates?, Sample Size = 738

# Respondents' Level of Decision-Making for Purchasing Technology Solutions



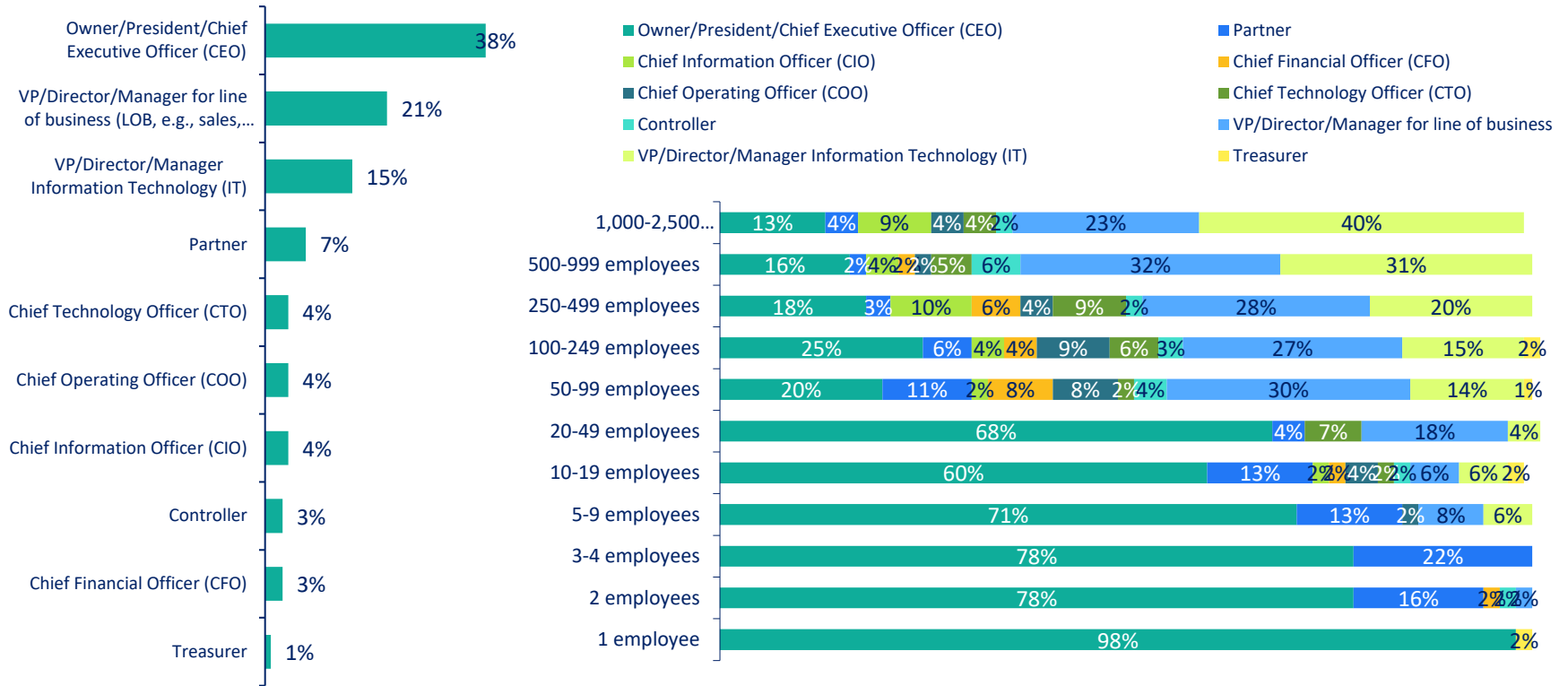
1) Which of the following best describes your decision-making level for selecting and/or purchasing technology solutions for your organization?, Sample Size = 738

# Respondents' Level of Decision-Making for Purchasing Technology Solutions by Industry



1) Which of the following best describes your decision-making level for selecting and/or purchasing technology solutions for your organization?, Sample Size = 738

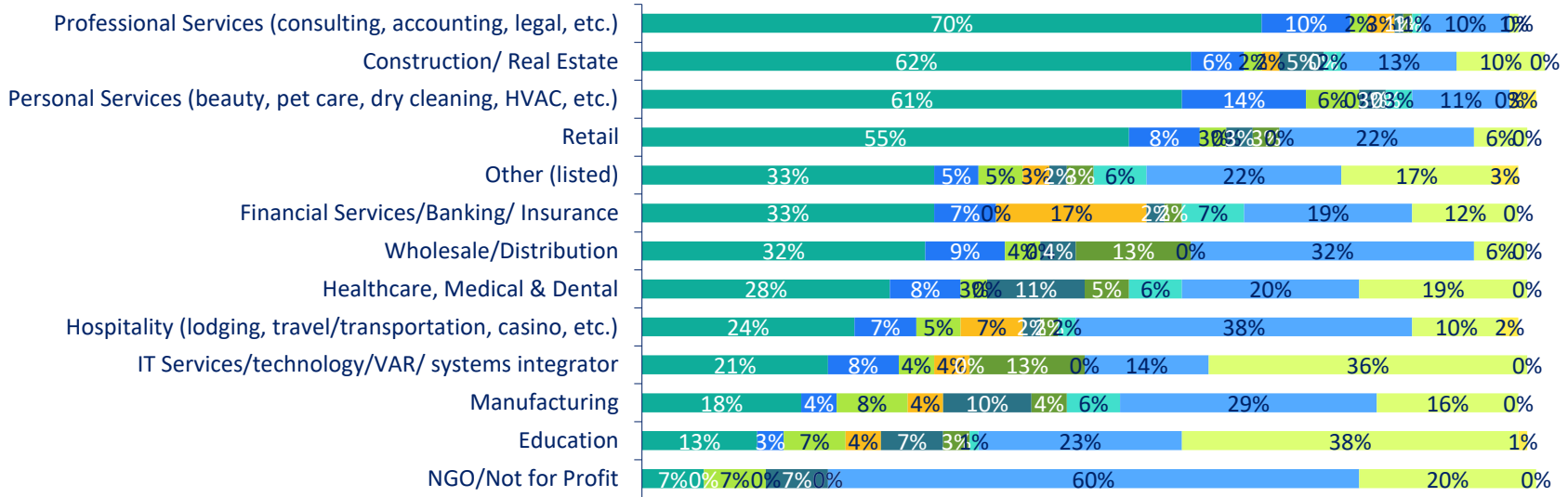
# Respondent Role



2) Which of the following best describes your role in your organization?, Sample Size = 738

# Respondent Role by Industry

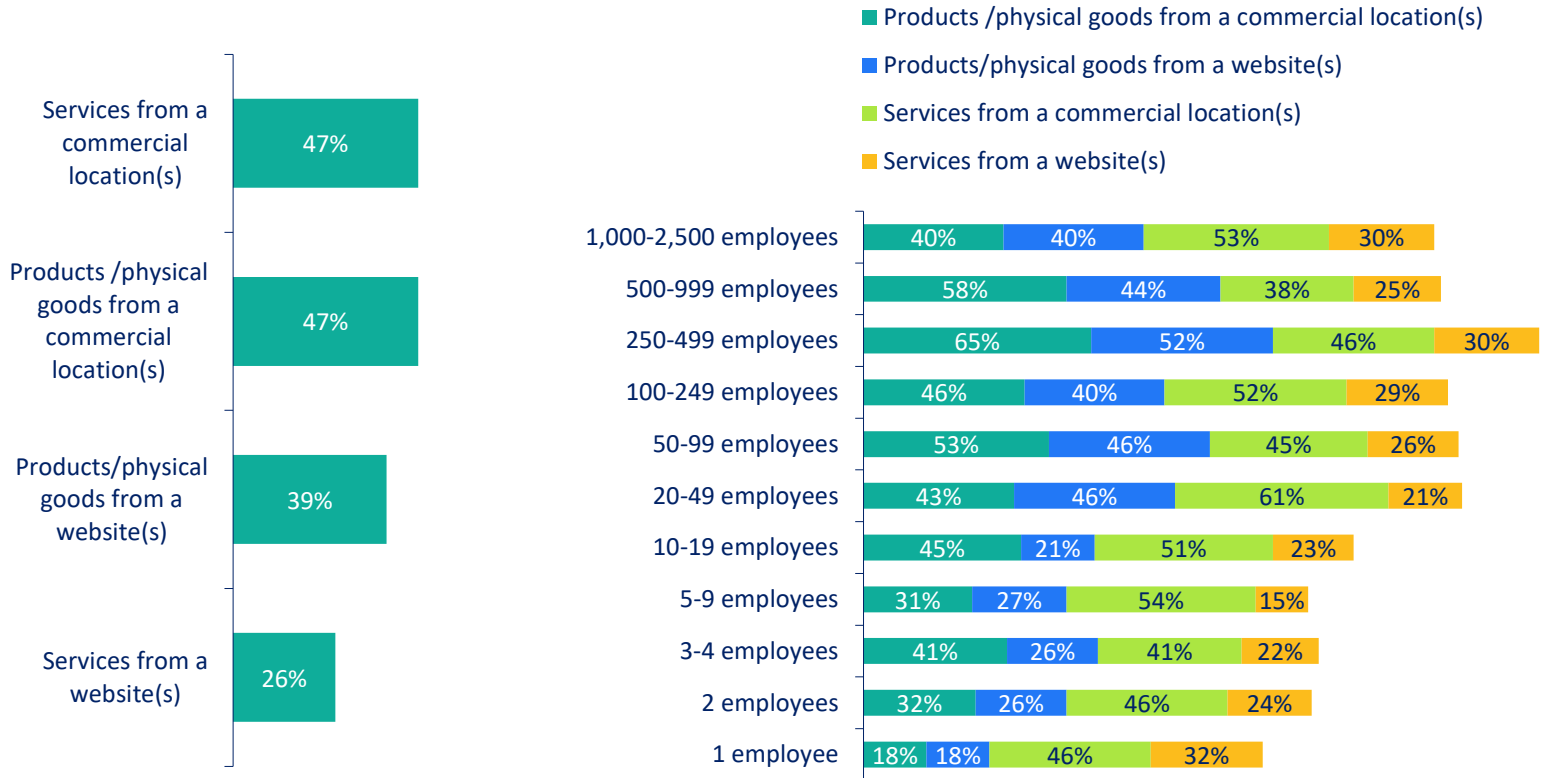
- Owner/President/Chief Executive Officer (CEO)
- Partner
- Chief Information Officer (CIO)
- Chief Financial Officer (CFO)
- Chief Operating Officer (COO)
- Chief Technology Officer (CTO)
- Controller
- VP/Director/Manager for line of business (LOB, e.g., sales, marketing, HR, etc.)
- VP/Director/Manager Information Technology (IT)
- Treasurer



2) Which of the following best describes your role in your organization?, Sample Size = 738



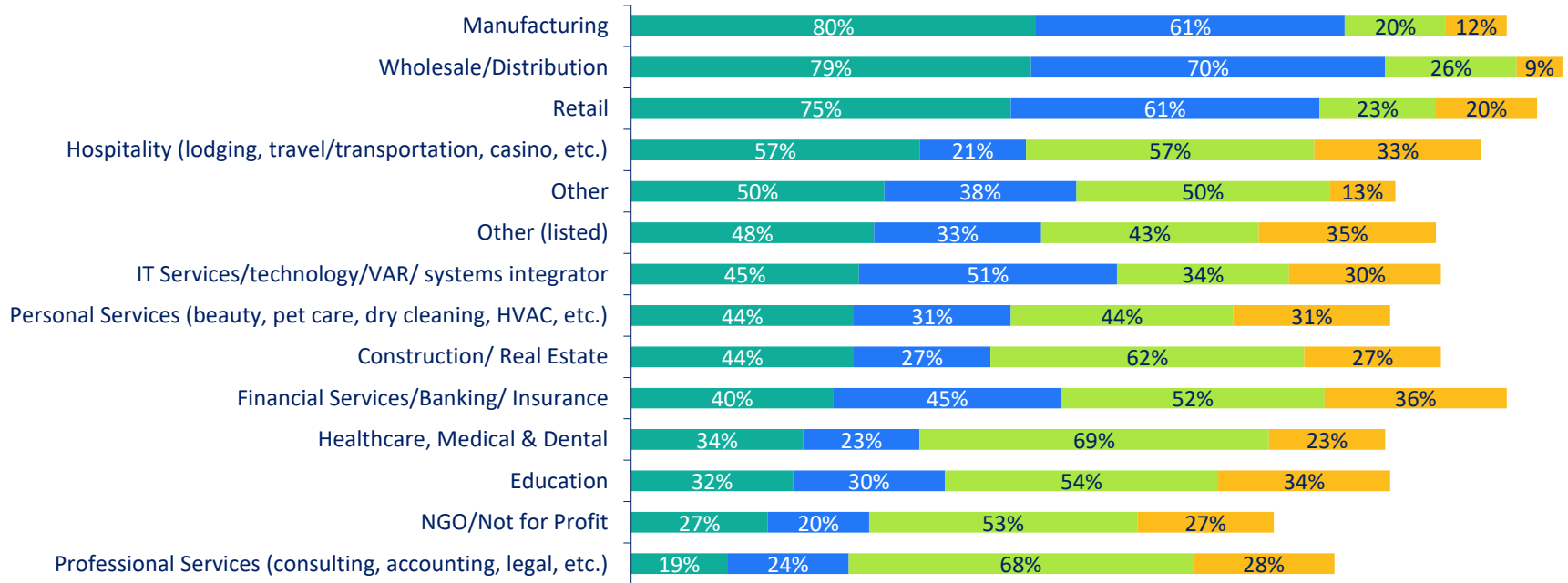
# Goods/Services SMBs Provide



44) Which of the following does your organization provide?, Sample Size = 738 (Select all that apply)

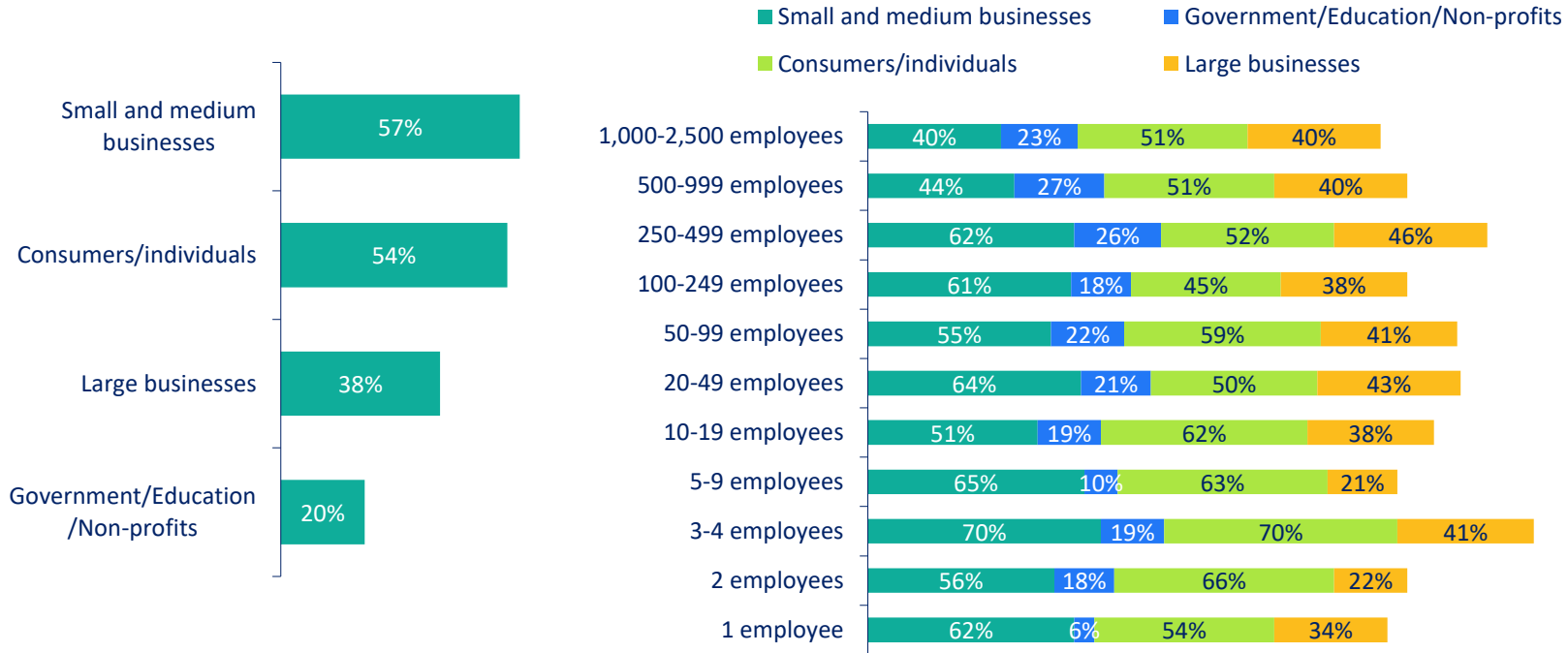
# Goods/Services SMBs Provide by Industry

■ Products /physical goods from a commercial location(s)
 ■ Products/physical goods from a website(s)
 ■ Services from a commercial location(s)
 ■ Services from a website(s)



44) Which of the following does your organization provide?, Sample Size = 738 (Select all that apply)

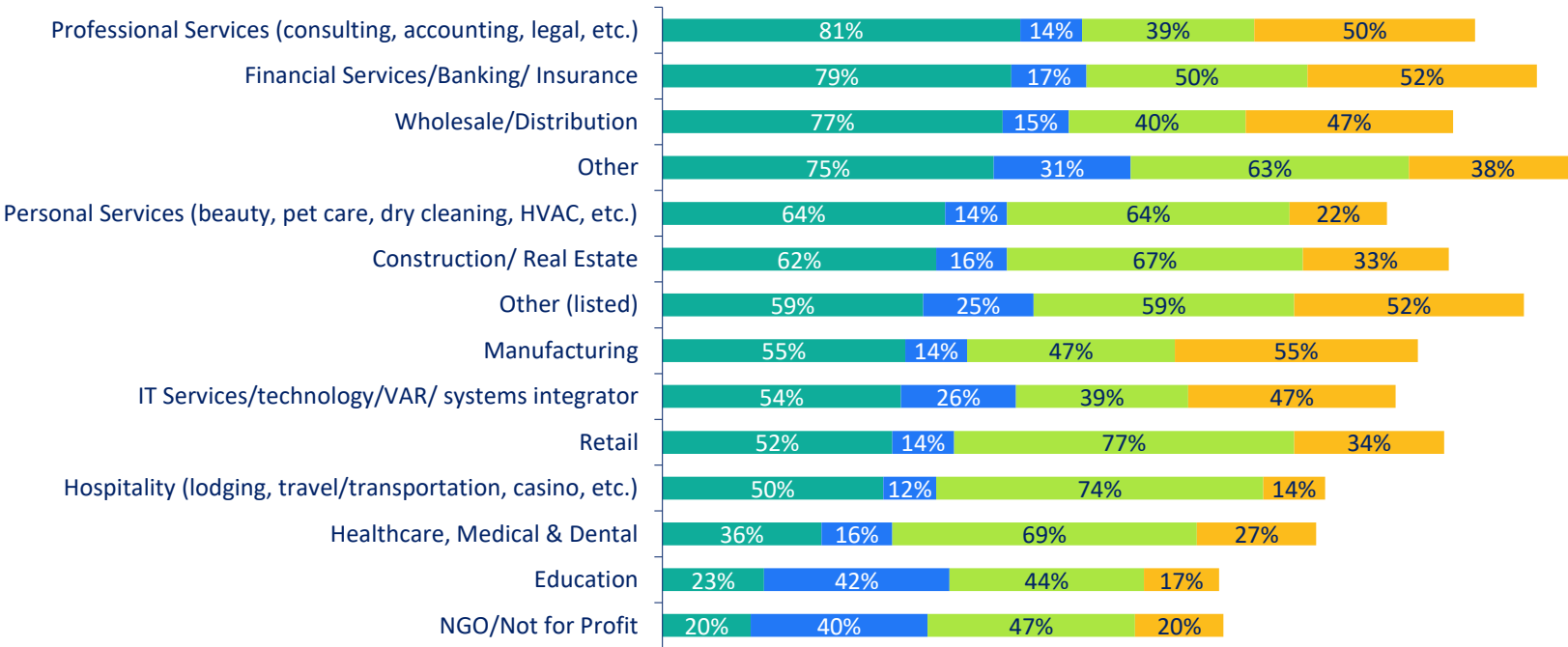
# Types of Customers SMBs Sell To



45) What type of buyers do you provide your products/services to?, Sample Size = 738 (Select all that apply)

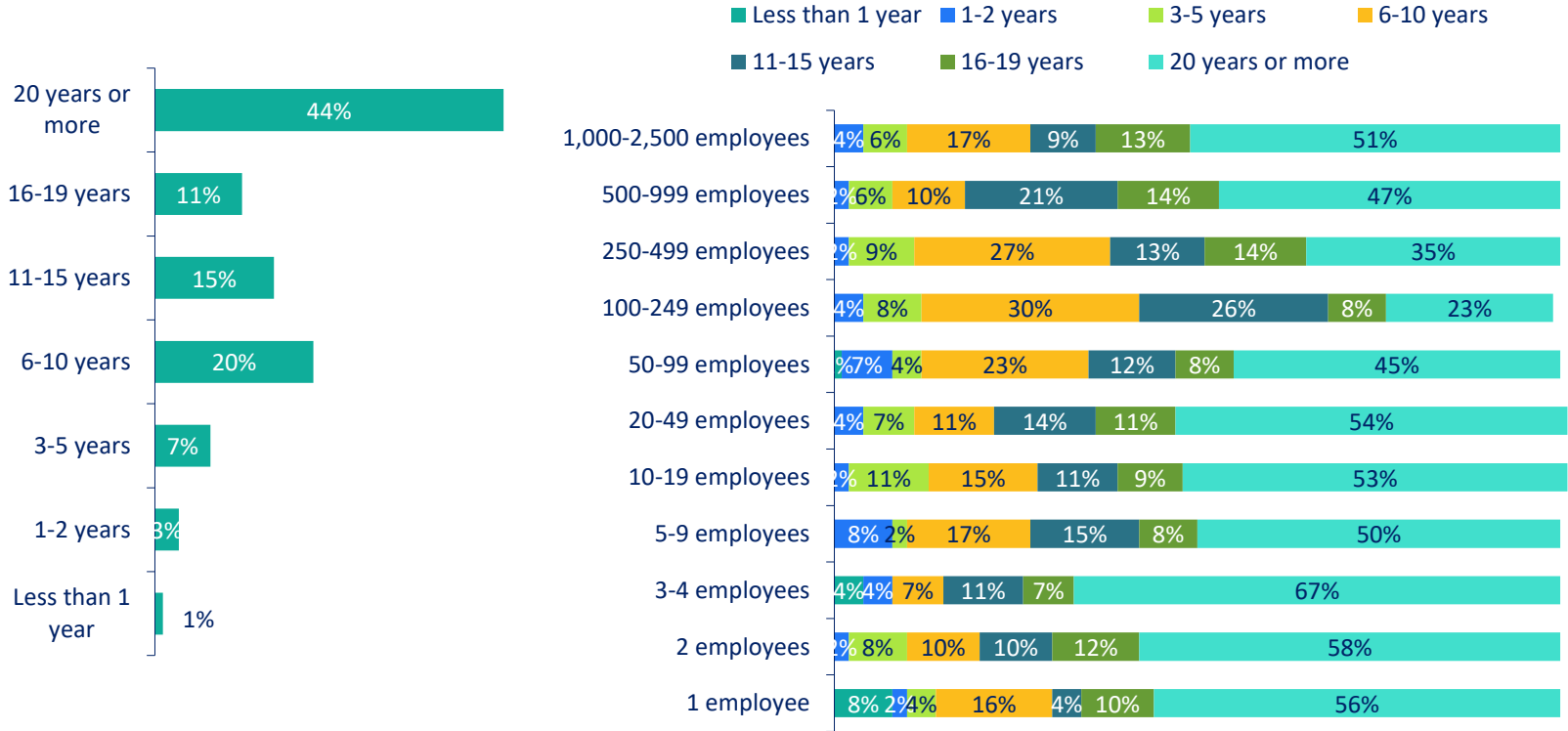
# Types of Customers SMBs Sell To by Industry

■ Small and medium businesses   
 ■ Government/Education/Non-profits   
 ■ Consumers/individuals   
 ■ Large businesses



45) What type of buyers do you provide your products/services to?, Sample Size = 738 (Select all that apply)

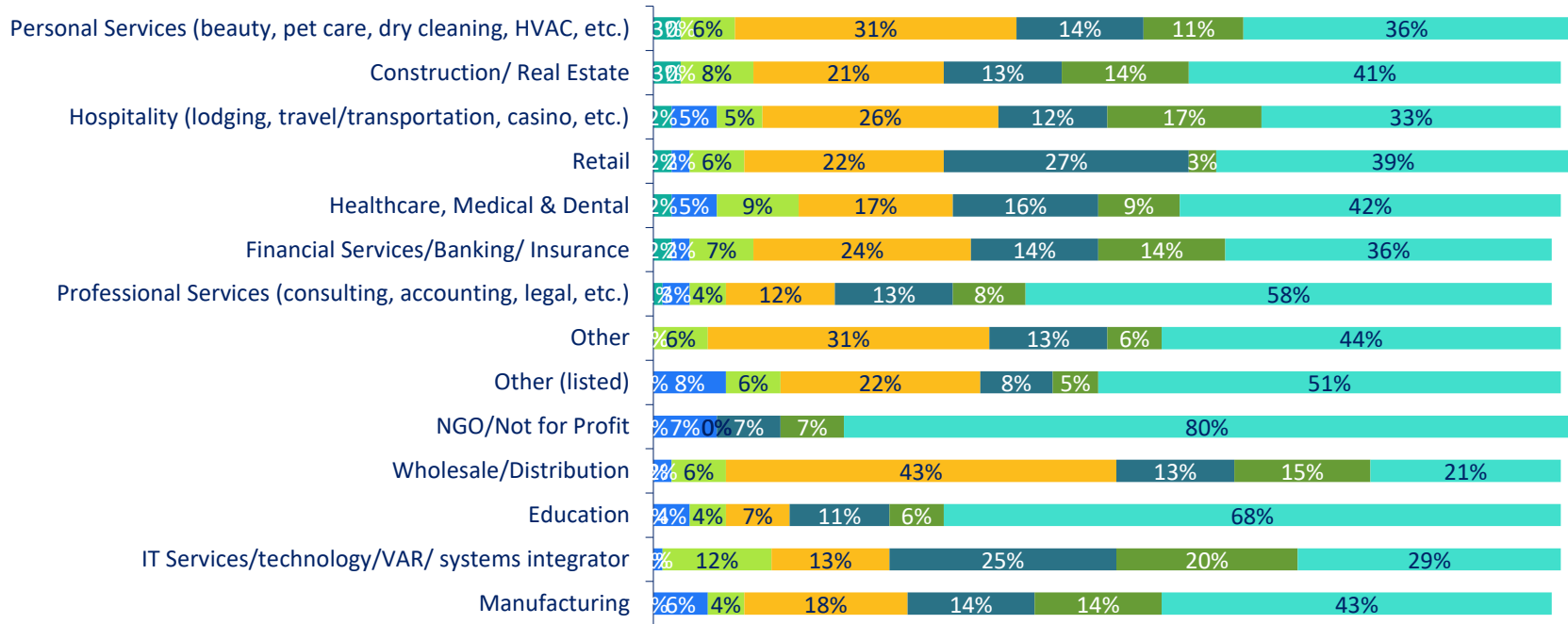
# Age of Business



46) How long has your organization been in business?, Sample Size = 738

# Age of Business by Industry

■ Less than 1 year  
 ■ 1-2 years  
 ■ 3-5 years  
 ■ 6-10 years  
 ■ 11-15 years  
 ■ 16-19 years  
 ■ 20 years or more



46) How long has your organization been in business?, Sample Size = 738

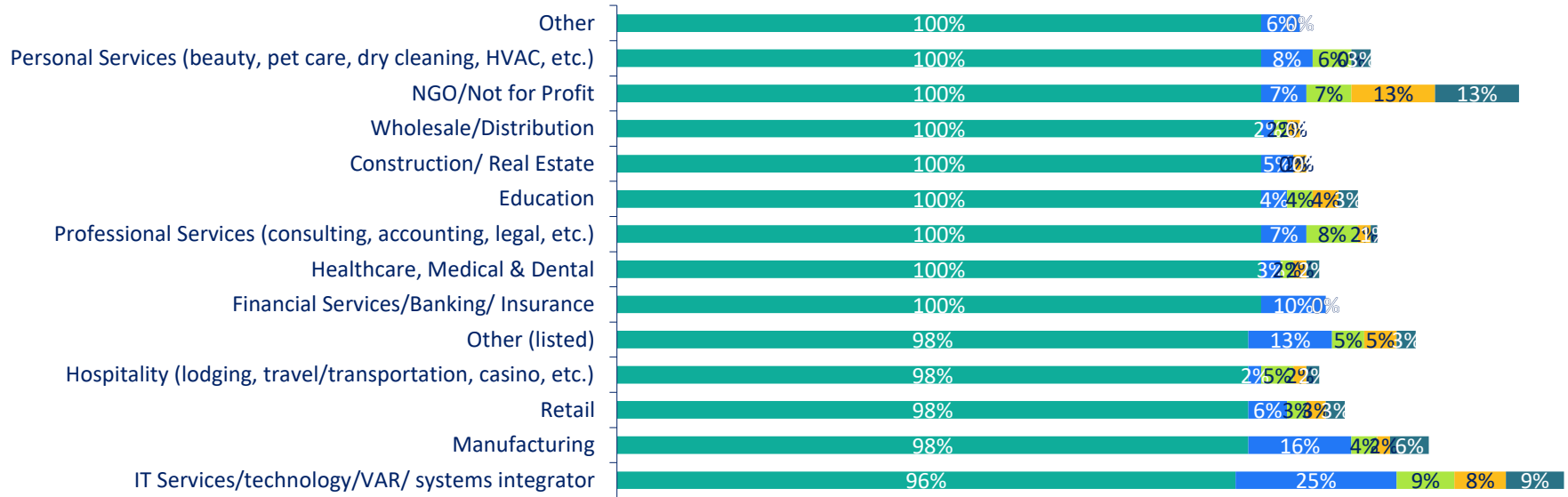
# Geographic Regions Companies Operate In



47) In what geographic regions does your organization operate?, Sample Size = 738 (Select all that apply)

# Geographic Regions Companies Operate In by Industry

■ U.S.   
 ■ Canada   
 ■ Europe, Middle East, Africa   
 ■ Asia Pacific   
 ■ Latin America (Mexico, Central and South America, Caribbean)



47) In what geographic regions does your organization operate?, Sample Size = 738 (Select all that apply)



# Thank You!

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***For more information, please contact:***

**Lisa Lincoln**

**Director, Client Services & Business Development**

**[SMB Group | 508.734.5658 | www.smb-gr.com](http://www.smb-gr.com)**

**[lisa.lincoln70@smb-gr.com](mailto:lisa.lincoln70@smb-gr.com)**

**SMB Group**

**[information@smb-gr.com](mailto:information@smb-gr.com)**

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