Practical guide

Choosing business systems without vendor lock-in

A practical guide for owner-managed UK businesses choosing ERP, CRM or e-commerce software — without a CTO, and without being steered by commission.

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If you run a growing UK business without a CTO, a systems decision lands on your desk sooner or later. Stock is messy. Orders are re-keyed. The spreadsheet that used to "just work" now depends on one person. Someone recommends an ERP, a CRM, or a shiny new e-commerce platform — and the demos all look convincing.

That is when lock-in usually starts: not as a clause you spotted, but as a decision made under pressure with only the seller's voice in the room.

What lock-in feels like in a real business

Vendor lock-in is rarely announced. You notice it later:

- Your data is hard to export in a form anyone else can use
- Changes only happen through the same supplier, at their pace and price
- Integrations are "possible" — until you need them, when they become a project
- Leaving means rewriting processes you have already trained people on
- Nobody inside the business can challenge the roadmap, because the roadmap is theirs

For an owner, MD or operations director, the cost is not technical. It is lost control: spend rises, options shrink, and the next big decision is already half-made for you.

Why this hits harder without a CTO

Software sales conversations are designed to create urgency. Preferential partner lists, "limited implementation slots", and polished demos are normal. None of that is illegal. It is just not the same as advice.

Without senior technology judgement in-house, it is easy to:

- Buy for the demo, not for the day-to-day work
- Underestimate data migration and training

- Accept customisation as a substitute for product fit
- Sign a multi-year deal before the process is clear

You do not need to become a technologist. You do need a sequence that keeps the business in charge.

Start with outcomes, not products

Before you speak to vendors, write down what must work every week in plain English. For example:

- Orders come in cleanly from every channel
- Stock figures can be trusted before anyone picks or buys
- Invoices go out without a chase through three systems
- The team can see what is late without asking around

If you cannot describe the outcomes, you are not ready to score software. You are still deciding what the business needs to do reliably.

A short Digital Business Health Check — or a conversation about Business Systems — is often enough to get that clarity before anyone books a demo.

A selection sequence that keeps you free

1. **Map the work** — hand-offs, rekeying, and the decisions people make when the system is wrong
2. **List must-haves** — integrations, reporting, locations, channels, and anything that must not break in month one
3. **Shortlist three options maximum** — more than that usually means the brief is still fuzzy
4. **Score against your outcomes** — not against the vendor’s feature matrix
5. **Run a proof on your real data** — a polished demo of sample stock is not evidence
6. **Agree the exit before you buy** — export rights, data format, who owns customisations, and what happens if the relationship ends

Independent technology advisory exists for exactly this stretch: criteria first, vendors second.

Questions worth asking before you sign

Ask these in writing. Vague answers are answers.

- How do we get a full export of our data, and in what format?
- Which parts of the solution are product, and which are bespoke to us?

- Who can support this if we change partner in three years?
- What breaks if we add another sales channel or warehouse?
- What is *not* included in the price we are looking at today?
- Can we see a customer of similar size and complexity — not a global brand case study?

If the room goes quiet on exit paths or scope, treat that as information.

Red flags

- A recommendation appears before anyone has watched how your team actually works
- "Everything is included" until implementation week
- The proposal leans on customisation to cover a poor product fit
- You are pushed to sign before a proof on your own data
- The only roadmap you are offered is theirs

Failed agency or preferred-supplier experiences leave a mark for good reason. The antidote is not cynicism. It is a clearer brief and an independent sense-check.

Good systems decisions look boring

They are rarely glamorous. They look like:

- A short written brief the whole leadership team recognises
- A vendor conversation where you lead with your constraints
- A pilot that surfaces awkward edges early
- A contract you understand without needing a lawyer for every paragraph
- A path to improve, buy, or walk away — with your data intact

That is the opposite of being steered. It is also how owner-managed firms avoid paying twice: once for the wrong system, and again to escape it.

Where Two Wrens helps

From vendor-neutral roadmaps to Business Systems delivery, and Technology Consultancy when the problem is deeper than a fixed package. If you need ongoing judgement after the choice is made, a fractional technology adviser can stay with you through implementation — without hiring a full-time CTO.

Next step

Book a Discovery Call before you sign anything long-term. Bring the outcomes you care about. Leave the product names until those are clear.

Talk it through

If this guide is useful, a Discovery Call is the natural next step — no obligation, no sales script.

Book: twowrens.co.uk/contact
Email: hello@twowrens.co.uk