

Selecting a Vendor

Preparing for the Software Demo



Selecting a new business system may be your most important task in the new century. Embarking on a software system selection project and a vendor's demonstration without a plan can be like climbing Mount Everest without a guide. The terrain can only get more treacherous once you start the process of evaluating and narrowing the list of possible system solution vendors.

Like the experience of climbing up an unfamiliar mountain, few business owners have the essential selection experience required when it comes to managing the software selection transaction. The selection of a new business system, and the negotiation of all its components, therefore, requires a methodical value-added approach to the decision-making process - just like the process of preparing to embark up Mount Everest.

Who will be using the system?

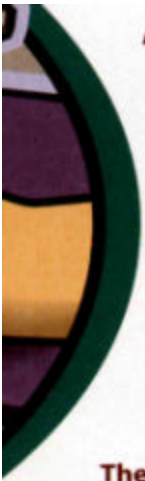
Like in most business situations, it is people that are going to make the most significant contribution to your system selection project. Personnel doing the "day-to-day" activities actually know best what they need from a new business solution and what the best solution might be, but they also don't have the time or experience to find it.

If this situation sounds all too familiar, then you may find value in using a facilitator or guide to help steer your system selection process. Your guide should be able to walk participants through the critical business processes and help focus on identifying those system requirements that will provide competitive or added value to the organization. An experienced guide can provide the framework for a methodical process that will lead to a solid decision.

Establish a contact

Once you have established a solid definition of your critical business requirements, you now need to establish the map you require your potential vendors to follow. One essential component is identifying who will maintain "primary contact" with the solution vendors. Software sales personnel are trained to manage or control the system sales cycle, always showing their product at the peak of the climb. By setting the rules ahead of time, you help ensure that you're moving toward your goal of the right business solution, and you are not another notch on the gun of their sales folks.

Identify the 10 or 12 potential suppliers that "appear" to meet your needs, and prepare for an invasion. Request the vendors' marketing materials or "brochureware." Be prepared to answer a multitude of questions about your project including: whether you are seriously looking for software; how long you expect your selection process to take; and if you will use the traditional request for proposal and/or demonstration process.



Asking questions

Conversely, you should, at the very least, develop a concise list of questions that can be answered by any vendor and you should look for concise answers. Use your questions to help map the selection landscape by narrowing your view to the vendors who meet your requirements. It is possible to evaluate these concise answers for depth and breadth. For example, did the vendor respond with a lengthy response because they wanted to include some kind of response, or did his response provide examples of how someone in your industry with similar requirements is currently using their system. As you survey the landscape, watch for key words in a vendor's response that tell you how well they understand your critical issues.

The demo

Prior to making your ascent up that selection mountain, you will want to take a practice climb. Many organizations utilize the demonstration or "conference room prototype" for such a purpose. Use your team of participants in the selection process to develop a series of tests or business scenarios that equate to your defined critical business requirements. Prioritize those scenarios into a logical sequence so that the business scenario can be "demonstrated" live in an environment for your team to review.

During this practice climb, the software vendor will want to increase his level of contact with your organization. If you are serious in your evaluation of the solution, you will need to decide which of your staff participate in the practice climb and how much contact they will have with the system solution vendor. Will there be additional contact by telephone or in person with members of your team? Here's where that "primary contact" person or a guide becomes important. Unless you have a resource dedicated to this task, you may find that your team spends a lot of time climbing the same path repeatedly on the selection mountain.

The short list

Using your previously developed questions as a baseline, someone on your project team needs to make a subjective evaluation of the solution vendors' responses to translate them into an objective score to facilitate your evaluation. Using an objective evaluation process provides your team with the opportunity to validate the critical processes and see which vendors they will be dealing with. Select the two or three finalists you want to participate in a practice climb or demonstration and invite them into your organization. Give them an opportunity to understand your business processes, obtain your demonstration scripts or business scenarios and clarify the differences between your terminology and theirs. Give the solution vendors the rules of conduct for your practice climb and schedule that climb at a mutually convenient time. Make sure that you spell out the demonstration rules and channels of contact with your organization completely.

The final step in the preparation for the practice climb is critical. No one solution provider will want to demonstrate first and everyone will want to be last. Decide on your order of demonstration and make sure that all solution providers understand the order and their time allotment. Try to hold your practice climbs or demonstrations as close together as possible. If you spread the schedule out over a longer period of time, it gives the last vendor an advantage over the first because you will have most likely forgotten what you saw, which is exactly why no one wants to be first and everyone wants to go last.

By choosing your selection team participants carefully, knowing when to seek a well-equipped guide, properly qualifying those vendors with business system solutions that meet your critical requirements and then carefully preparing for that practice climb, you can ensure that your path up the system selection mountain will be smooth and successful.

Preston D. Cameron is the President & Managing Director of Oculus Consulting Group. He can be reached via e-mail at oculus_consulting@att.net by telephone at 314-422-6365.

As you survey the landscape, watch for key words in a vendor's response that tell you how well they understand your critical issues.