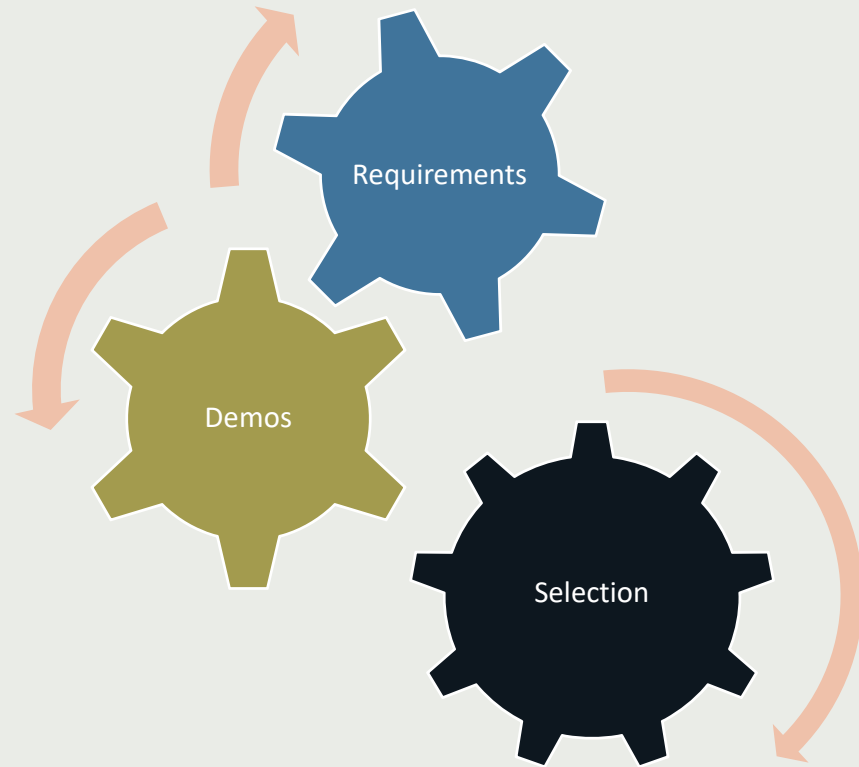


Software Selection Process

WAYNE PACHOLL



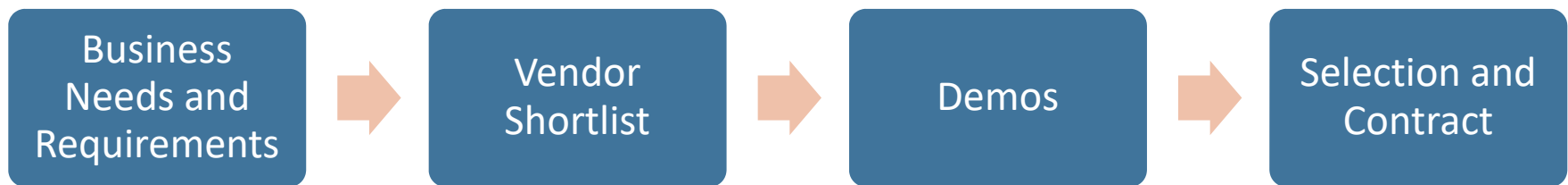
Agenda

- Process overview
- Step activities and **lessons learned**
 - Business need and requirements
 - Vendor shortlist
 - The demos
 - Selection and contract

Why is this important?

You are committing your organization to a fixed set of features, processes, user experiences, and costs.

Section Process Overview



Business Needs and Requirements

Beware: technology looking for a business need

“I saw this on a webinar”

“I was talking to someone”

“I read an article”

“Innovative companies are doing this”

Is your organization going to **use this effectively**?

Business Need and Requirements

★ The most important step

- What is the main objective? **Why?**
- What benefits do you expect?
- Be **realistic** with requirements
- What features are **required?**
- What features are optional but **differentiators?**
- Do you send a written RFP?

Vendor Shortlist

- Industry reports and groups
- Pick high-level **filtering** criteria from requirements
- Initial vendor discovery
- cursory demos
- Vendor risk and stability
- Reduce to 3 or 4 max

Beware: Confirmation bias is when we only seek input that supports our point of view

Productive Demos

Focused
Distractions
Duration
Pace



The Demos

- Demo sessions – **audience**
 - Core Functional users
 - Occasional users
 - Technical users
- Create a specific agenda
- Items **must be shown**
- The **user experience** is important
- Be alert – ask questions
- Scoring **same** day
- Numeric and qualitative comments

Selection and Contract



You're not done yet

- The finalist
- Multi-year cost analysis
- Technology security review
- Customer referral calls
- Master service agreement (MSA)
- Licensing
- Statement of work (SOW)



The Winner and Implementation

A vendor is a long-term partner

If you purchase the right product it will go smoother

Questions?

