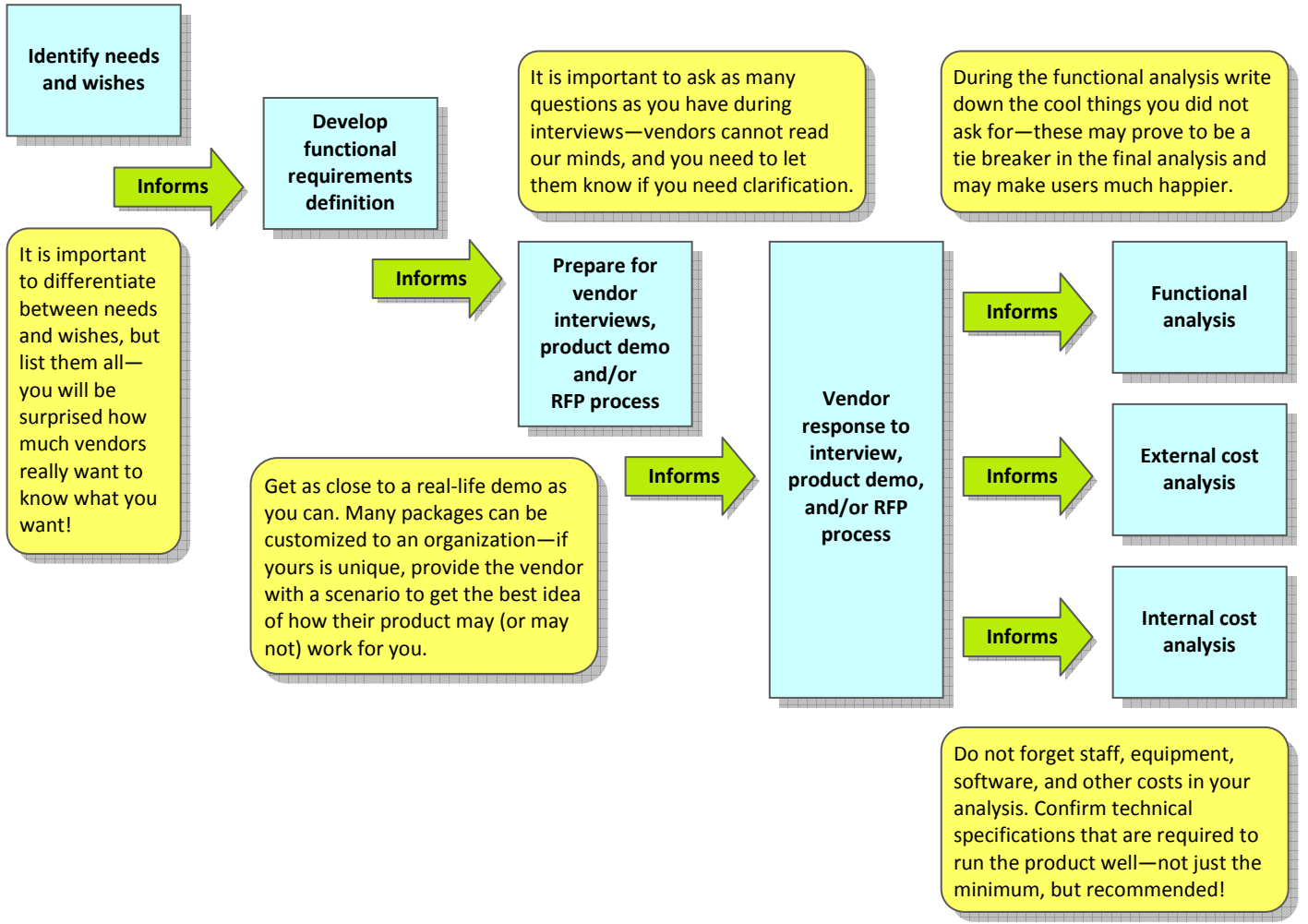


The Product Evaluation Process



Step 1: Identify Needs and Wishes

Brainstorm. Write down the absolute requirements of the software and the features and functionality that you or other users in your organization would find useful. For example, it may be required that your organization can create your own data entry forms and that the package meet certain data security requirements. In addition, it may be desired—but not required—to be able to drag and drop information within the forms or easily copy information from one record to another.

Step 2: Develop Functional Requirements Definition

Document your needs and wishes in an organized fashion, clearly identifying which are required and which are desirable. Include your work flow in your documentation—this may be your current work flow, or how you envision your work flow once the software is implemented. If it is the latter, it will be helpful to the vendor to provide some idea of any legacy data and processes that may remain in part, and for how long.

If you plan to score vendor responses, determine the priority of each item and design a scoring table like this:

Item	Required?	Possible Points	How will this be demonstrated?
Web-based system	Yes	10	Can be operated using only a browser on the user's workstation.
Color-coded fields for data entry ease	No	2	Allows administrator to determine color of label and actual field data on screen.

Determining how you will score the functionality will force your organization to really think about what is important in the software that you choose. If you are constrained by a predefined RFP process with predefined scoring or other evaluation method, you may not have the flexibility to determine your own scoring.

Be sure to include support topics and the costs—both internal and external—in your scoring. For example, if you have limited internal technical staff, you may score a vendor higher if their product requires less set-up and customization by your staff. In contrast, if you are working with a very tight budget, you may score a vendor higher if their start up costs are very low and you have a volunteer that has offered to help with some of the set up and configuration tasks.

Step 3: Prepare Vendor Interviews, Product Demo, and/or RFP Process

Depending on the situation and resources available, it may be appropriate to identify potential vendors with software packages that are already established. Simply contact them and set up interviews and product demonstrations. In some situations it may be more appropriate—or even required—to follow a more formal Request For Proposal (RFP) process.

In any case, prepare a scenario for pricing and either verbally or in writing provide the vendor with a definition of your workflow. If you take the time to examine your workflow, you will likely find ways to improve it—this is a great side benefit of this process.

Give the vendor enough time to prepare their product demonstration and cost proposal, and assume you will identify more questions during the interviews and demonstrations. You probably will not reach a final decision immediately after the interviews and demonstrations. Give the vendors and yourself sufficient time to ask and answer any new questions that come up.

Step 4: Vendor Response to Interview, Demo, and/or RFP

During the interviews, demos, and/or while reading the responses to the RFP, members of the evaluation team should pay close attention to vendor answers and ask any clarifying questions. Take notes during the presentations—these will be important during the scoring. Write down cool things that were not part of your functional requirements definition! These may be tie breakers and/or make your users much happier.

Step 5: Functional Analysis, External Cost Analysis, and Internal Cost Analysis

Score and analyze each of the items in your list of needs and wants using your notes from Step 4 and the vendor responses to your questions. If you are the sole evaluator, include users in the demonstrations so that they can provide feedback on the products.

For the cost analyses, determine all of the costs that will be incurred during the course of the project. Be sure to include external costs such as software licensing, maintenance and support, training, fees for always-on database connections for reporting, etc. For internal costs, take into account staff time for design, set-up, training, report writing, etc.