NECA
PHILADELPHIA
SEPT 29 - OCT 2, 2023

IT Software &
Hardware Vendor
Selection
*How to Find a
Partner not a Vendor*

Matt Lamb
Chief Information Officer
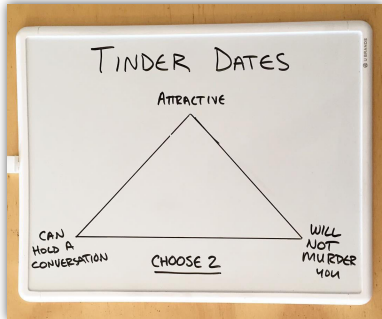Rosendin

CONVENTION EDUCATION

This session is eligible for 2 Continuing Education Hours.

For these hours to appear on your certificate, you must:
- Have your badge scanned at the door
- Attend 90% of this presentation
- Fill out the online evaluation for this session

Finding a Vendor is Kind of Like Dating...

TINDER DATES

ATTRACTIVE

CAN HOLD A CONVERSATION   CHOOSE 2   WILL NOT MURDER YOU

SIGNS OF A
healthy relationship

Open Communication — Healthy Boundaries — Mutual Respect — Appreciation — Trust — Safety — Laughter — Kindness — Understanding — Support — Accountability — Warmth — Honesty — Compromise — Empathy

So how do we get there?

Technology Selection Process

Initiation & Planning → Requirements Gathering → Vendor Evaluation → Vendor Selection

Three Steps to Success

Know Your Requirements — Find a Vendor — Find What's Real

Step 1 – Know Your Requirements

Bad Requirements / Good Requirements

inconsistent
not aligned
incomplete
not implementable
incomprehensible

trackable
clear
necessary
testable
complete
comprehensible
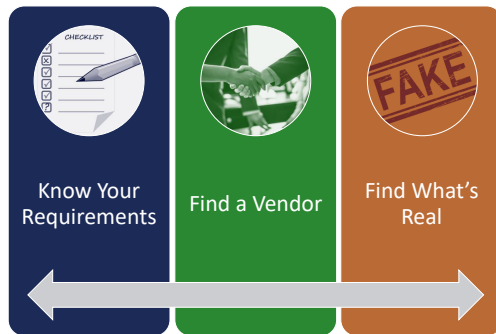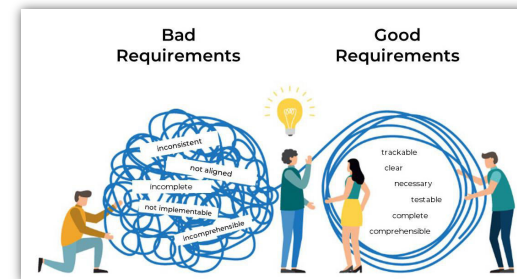
Requirements

If you don't know what you need, how will they…

Identify the Real Problem

- Don't be fooled by large amounts of data
  - If you are going to collect it, <u>analyze</u> it
- Dive below the surface
  - Events are above the surface, causes are below
- Widen your focus
  - Get multiple perspectives on the problem
- Define the boundaries of the problem
  - Avoid generalizations to stay focused
- Identify causes, effects and key stakeholders
  - What are the root causes, how can stakeholders be part of the solution
- Analyze the future
  - Don't just think about your business today, think about tomorrow

https://executiveeducation.wharton.upenn.edu/thought-leadership/wharton-at-work/2015/06/identify-the-real-problem/

Once the Problem is Identified

- Do Research!

Requirements

- Identify what problem you are trying to solve

- Have the right people in the room to discuss needs
- *Include the people who will be using the product

- List out Needs vs Wants.

- Sleep on it and review the list again

What the document looks like...

- Purpose
- Intended Audience and Intended Use.
- Product Scope.
- Definitions and Acronyms.
- User Needs.
- Assumptions and Dependencies.
- Functional Requirements.
- External Interface Requirements.
- System Features.

Additional Things to Think About

- Do you have resources in house to support the project
  - Both Project Management & Technical Resources

- Do you need Professional Services?
  - For implementation, post implementation, training?

- Do you need additional infrastructure(Cloud or Hardware)?

- Have you considered security implications?

Step 2 – Find a ~~Vendor~~ Partner
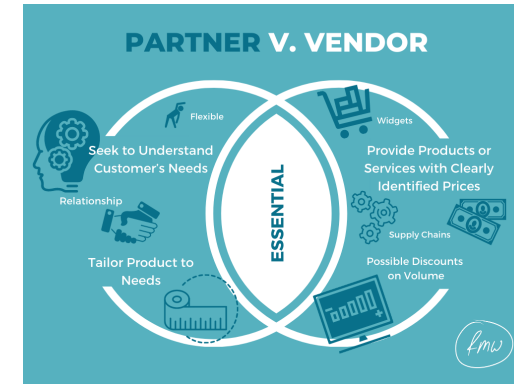

Definitions

A vendor is a general term used to
describe any supplier of goods or services. A vendor
sells products or services to another company.

Definitions

A business partner is a commercial entity with which another commercial entity has some form of alliance. Both parties work together to achieve a common goal.

PARTNER V. VENDOR

Seek to Understand Customer's Needs

Flexible

Relationship

Tailor Product to Needs

ESSENTIAL

Widgets

Provide Products or Services with Clearly Identified Prices

Supply Chains

Possible Discounts on Volume

So where do I find a partner?

- Ask Peers, Friends etc.
- Attend Conferences and chat with companies at their booths
- Interview vendors to find who wants to be a partner

So how do I find a partner?

- It's a two-way street, you will have to give something too.
- Look for companies that use the word "Partner".
- If you get bounced around sales people, move on.
- Make sure they are listening to your needs and not just telling you what they have that "Might" fit your needs.
- Ask a lot of questions.
- Do reference checks.

Step 3 – What's Real vs VaporWare

What is VaporWare?

It comes in all forms, shapes and sizes. It is the pot of gold at the end of the rainbow, it's what you want to hear. But its not real.

How to Spot VaporWare

Do a demo, setup a sandbox...USE the software, product or tool.

The key is to use it yourself, don't just believe what you see in a PowerPoint slide deck or in a video.

Watch out for phrases like:

"It's on our roadmap"

"We've been looking into it and are getting close"

KEEP CALM IT'S ON THE ROADMAP

How to Find the Right Product for You!

CUSTOMER NEED

THE RIGHT PRODUCT

How to Find the Right Product for You!

Use the requirements you created in Step 1 to work with your Partner you found in Step 2. Do hands on demos with real end users as shown in Step 3.

How to Find the Right Product for You!

- Tell them the problem you are trying to solve
- Have working sessions to review your needs and requirements
- Be open and honest about challenges you are having
- Share you desired end state

You may be "dating" more than one company during this period.

|	Criteria	Vendor A				Vendor B			
		Points	Weighting	Total	Must	Points	Weighting	Total	Must
50%	Understanding project goal	10	15%	1.5	1	7	15%	1.05	1
	Price	10	20%	2	1	3	20%	0.6	3
	Vendor impression	3	15%	0.45	2	3	15%	0.45	1
10%	101 Non fuctional requirement 1	3	5%	0.15	2	3	5%	0.15	3
	102 Non fuctional requirement 2	7	5%	0.35	1	7	5%	0.35	1
20%	201 Functional requirement 1	7	5%	0.35	1	7	5%	0.35	1
	202 Functional requirement 2	7	5%	0.35	1	7	5%	0.35	1
	203 Functional requirement 3	7	5%	0.35	1	3	5%	0.15	2
	204 Functional requirement 4	7	5%	0.35	1	3	5%	0.15	2
10%	301 Functional requirement 5	10	3%	0.3	1	7	3%	0.21	1
	302 Functional requirement 6	10	7%	0.7	1	7	7%	0.49	1
10%	401 Service provisioning A	3	5%	0.15	2	3	5%	0.15	2
	402 Service provisioning B	7	5%	0.35	1	7	5%	0.35	2
100%	TOTAL:	91	100%	7.35		67	100%	4.8	

Legend Score:
10 Fully accomplished
7 Mostly accomplished
3 Partially accomplished
0 Not usable

Legend Killer Criteria:
1 All Must Criteria met
2 All Killer Criteria met
3 Killer Criteria not met

How Do You Know the ~~Vendor~~ Partner is Good?

Are they in it for the long haul…

I'm fully committed to this relationship for the entire honeymoon period.
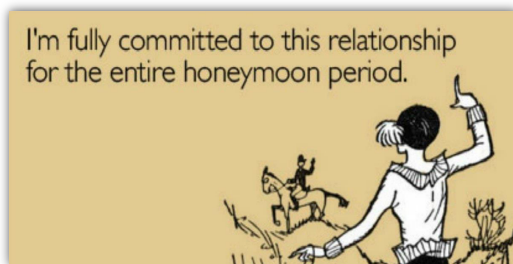
Are They Good?

- Did they listen to you?
- Did they deliver on their promise?
- Are your users happy with the solution?
- Did they deliver on budget and schedule?
- Did they solve the problem you identified at the beginning?
- Will you call them again for your next problem?

Sometimes you must trust your gut

Complete the Online Evaluation