

A Sample Process for Evaluating Mission-Critical Software

		Proposed Timeline	Your Staff	Vendor Staff	Proceed to Next Step or Stop?
Initial Discussion with Prospective Vendor	To provide you with a broad understanding of the vendor and their products, To provide the vendor with a broad understanding of your critical business needs, and To establish whether their pricing and your available budget are in general alignment.				Proceed
Introductory Presentation	Have the vendor provide an introductory look at their software's features and begin discussing how these might fit your organization's needs; ask about and assess long-term value of proposed solution at this time				
Exploratory Meetings with Key Users; Fit Analysis	Invite the vendor to talk to your key staff users in order to gather and assess specific requirements and then to match those to specific product features for you				
Customized Demonstration	Ask the vendor to provide a demonstration of the software's specific features and processes as would be applied to your particular needs and interests				
Further Reviews As Needed	Conduct any other activities you need to feel comfortable -- further demonstrations? A technical briefing for your IT staff? A briefing by a senior executive of the vendor for your executive leadership on the vendor's business philosophy and strategy? Reference checks and/or site visits to other customers already using the software?				
Proposal Presentation	Have the vendor present a final detailed proposal with specific solution elements, costs, and implementation timeframes				
Proposed Implementation Review	Make sure you understand and consent to the vendor's proposed implementation plans, milestones, and dates after considering your organization's existing staffing demands, activities, and schedules				
Contract Review	Have your legal counsel review the proposed contract and get questions answered				

<p>At Buy Decision: Sign Agreements and Purchase Software; Evaluate Any Discounts for Pre-Purchasing Future Hours (or Years) of Support & Maintenance</p>
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Implementation	Your selected vendor should complete a "business processes review" as the first step of your implementation, then complete your resulting specific configurations, then migrate all existing data into your new system, provide extensive training to all of your users and, finally, be there to hold your hand through "go-live"			
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