

Session M22  
How To Procure The ECM Solution That Is Right For You

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Agenda

1. What you need to do first
2. RFPs: the good, the bad and the ugly
3. You have the responses – now what?

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What do you need it to do (really)?

- Determine your *business* requirements, now and in the near to mid term (i.e.: what are you trying to achieve?)
  - Competitive advantage, compliance, operational efficiencies?
  - What's truly unique and special about your organization?
  - What do you need to fix *today*?
- Determine *functional* requirements, now and in the near to mid term (i.e.: what does the solution need to do?)
  - Web content? Document management? Records management?

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Organizational Considerations

- Enterprise or departmental?
- Centralized or de-centralized?
- Geographic footprint
- Multi-language
- User demographics

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Technical considerations

- What infrastructure are you starting with?
  - Database software
  - File formats
  - Email platform
  - Development environments (Java, .Net, Websphere)
- What performance requirements do you have?
  - # of users
  - Content load
  - Availability

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How do you know what products you should consider?

- Ask your peers within and *outside* of your industry
- Consult the usual suspects:
  - ARMA
  - AIIM
  - Gartner
  - Forrester
  - CMS Watch

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The Top Tier reality

Top tier ECM products all do the same thing, the difference is *how* they do it

- Gartner's 2009 ECM top tier: Oracle, EMC, IBM, Microsoft, OpenText
- All *credible* ECM products provide Basic Content Services (BCS)

Most top tier products are platforms, *not* solutions

- They can say yes to just about anything in a feature/function list
- Your definition of 'out of the box' does not equal theirs
- Platform is a good thing, but flexibility adds complexity

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Open Source Considerations

License may be free or may cost a portion of COTS license fees for supported Open Source (e.g. Alfresco Enterprise)

Implementation costs may be comparable to COTS products

- My mechanic charges the same \$/hr if I bring my Jeep or you bring your Mercedes

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The making of a good RFP

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You need 2 RFP's

1<sup>st</sup> Select software  
2<sup>nd</sup> Select services

Separate the selection so you can clearly compare apples to apples

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What you are looking for when you select software

- Functional Fit
- Technical Fit
- Integration Options
- Total cost of ownership
- Ramp up time

*Technology does not make up for a lack of governance!*

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Terminology pitfalls

Must & Should are not the same thing

- Must is mandatory, Should is highly desirable

Integrate vs. Interface

Compatible With

Pilot vs Prototype vs Proof of Concept

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Some of the least and most useful things to put in the software RFP

Don't Do This

- Exhaustive and granular lists of features and functions, most of which are tagged as 'must have'
- Specify obscure requirements that only one niche product will meet (e.g. automatic Swahili to English translation)

Do This

- Clearly articulate what you are expecting the system to do: how will it be used from day to day? What discrete problems will it solve?
- Ask for a clear statement of the vision for the product and what they are working on for the next release

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What you are looking for when selecting implementation services

- Subject matter expertise and knowledge of best practices in ECM solution implementation
- Technical qualifications on the software you have chosen
- Track record
- Value-added services
  - Change management
  - User-centric / usability design
  - Train-the-trainer

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A word about fixed-price versus time and materials

Fixed price always includes a risk premium

- And make sure to budget for change requests
- Time and materials with a ceiling is essentially fixed price

Trust is key

- One approach is to ask for a fixed price 'discovery' phase, and per diem rates/effort estimate ballpark for the whole project (to be locked down at the end of discovery)
- Ask what 'accelerators' are being brought to the table if the effort looks unrealistically low

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Some of the least and most useful things to put in the services RFP

Don't Do This

- Be overly specific in your reference parameters – much experience is very transferable
- Ask for resumes – are you really going to read through all that detail?
- Have a rigid, predetermined idea of approach
- Ask for a detailed project plan or implementation schedule

Do This

- Ask whether the team that completed the work is still employed there and/or will be working on the project
- Ask for profiles of key project team members that outline recent and relevant experience
- Ask for recommended approach and methods, and why they promote success

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Going Fishing?

If all you're after is information, issue an RFI not an RFP

If you ask for too much detail, we will get suspicious

- You need a balance between the amount of detail you need to make a decision and asking us for proprietary information

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You have the responses – now what?

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The major evaluation components

- Written responses to RFP questions
- Live responses (demos / presentations)
  - Do not underestimate the importance
- Cost (short and long term)
- Site visits / reference interviews

Use a scoring matrix with weightings (that you developed when you wrote the RFP)

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Written responses – the meat of the proposal

- Look for a demonstration of understanding of what you are trying to accomplish (not just boilerplate)
- Brochureware is rarely useful
- Clear and concise is a good sign
- There are often several ways to achieve the desired outcome; don't be alarmed if options are discussed as opposed to one definitive answer

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Organizing successful short list demos

You must have a script that reflects how you plan to make use of the system

- But don't ask for the world – concentrate on core business requirements

Identify and segregate the audience(s)

- Have a business-focused demo
- Have a technology-focused demo

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An example of a script

The marketing department has just prepared a new case study. Demonstrate the following process:

- Check the draft case study into the content management system, apply metadata, and route it to the communications department for final editorial review
- Complete the review and update the version to Final; verify that this version cannot be edited further
- Apply appropriate retention schedule
- Publish the new case study to the web site

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Realistic Costs

For every \$ you spend on license expect to spend \$4 - \$5 on implementation

- Includes internal costs
- Open source is an exception

“Suites” will have features you will never use, but you will still have to pay for them (and pay to maintain them)

- However, they also provide capabilities you can roll out when you are ready

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Questions?

What else do you want to know?

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