8 Steps to Selecting Technology

That really delivers user and business requirements

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TECHNOLOGY SELECTION IN EIGHT STEPS

If you are looking for new technology to support the customer's experience at any step in their journey, this brief guide provides an eight-step process that will help you select the right fit technology and implementation service provider for your organization.

1 Validate the Need	**2** Compile Requirements	**3** Determine Core Needs
4 Create Tech Shortlist	**5** Create Partner Shortlist	**6** Conduct Info Exchanges
	7 Conduct RFP Process	**8** Hold Proof of Concept

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Validate
The Need For
New Tech

If you are considering an investment in new technology, your initial questions should be.

- Do we have a technology problem or is there something else going on?

- Could we solve our problem by fixing our content, assets, and/or adjusting our processes?

- Do we have a supporting strategy and is it aligned with our organizational objectives?

- Should we update, rather than replace, our existing technology?

Taking the time to ensure you've selected the right fit

technology for your organization's unique needs is a critical first step. Implementing new technology or migrating from one solution to another is incredibly disruptive and time consuming.

It can take a company up to two full years to select, implement, and migrate content onto a new platform and then the challenge of user adoption and training begins.

START BY:

- ❑ Evaluating current technology installation.

- ❑ Considering existing strategy and processes.

- ❑ Identifying related business challenges.

- ❑ Identifying key technology short comings.

- ❑ Confirming the need for new technology.

Next step
Compile requirements

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Compile Requirements

In gathering requirements there are many important questions that need to be answered.

- Who will use the new technology?

- What business functions will it support?

- What other systems will you integrate it with?

- What types of content are being managed and what channels do they support?

- How long will it take to plan, design, develop, and deploy?

Be sure to interview representatives from all impacted stakeholder groups. Include representation from management, lines of business, site administrators, and of course, information technology.

In these interviews, try to understand what success looks like to each stakeholder. Ask them what they are trying to achieve with the new system. Also, don't forget to gather their pain points with the current platform.

START BY:

- ❑ Creating communications and change management plans.

- ❑ Identifying key stakeholders.

- ❑ Gathering technology requirements.

- ❑ Gathering partner requirements.

Next step
Determine core needs

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Determine
Core Needs

The next step is to identify five to ten requirements that are the most relevant. We call these "core needs."

The complete list of requirements is still relevant and will be used to evaluate the shortlist later in the process, but most items are unlikely to help reduce the vendor choices in a meaningful way. Core needs have at least one of two characteristics:

- They are idiosyncratic to your organization.
  Every organization is unique, and the uniqueness of a requirement should translate it into being a core need.

- They are a high priority for your organization.
  For example, if your organization has a decentralized content management model with hundreds of users accessing the system with varying frequencies, an intuitive and easy-to-use interface is essential.

Idiosyncrasies → Core Needs ← High Priority

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Create Technology shortlist

With core needs laid out, you are ready to compile a list of potential vendors that can meet those needs.

Ideally, your shortlist will include three technology vendors. To narrow the list, look beyond what the platforms commonly share, and find the differentiators.

Many vendors go to market with quite similar lists of features, but it is how those features function and the complexity of the processes that they support that differentiate them from each other.

Because of the overwhelming number of vendors on the market, it can be difficult to get to three options. However, it is possible to quickly narrow the field by making a few core decisions up front regarding technology framework, budget, and partner's strengths.

*Have an existing partner partner?

Start your shortlist with the systems they recommend. If those systems don't meet your core needs, then you should you consider other solutions. Existing relationships with partners are highly valuable

START BY:

- ❑ Determine the most relevant technology framework.

- ❑ Confirm your available budget for technology licensing and support, as well as partner for integration, strategy, and support costs.

- ❑ Assess your current partner's strengths. *Do they meet your needs?

- ❑ Engage an external consultant.

Next step
Create an implementation partner shortlist

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Create An implementation partner shortlist

Use your core needs to identify qualified potential partners.

Once the shortlist of technology vendors is complete, you can define a parallel list of partners. Ask each of the short-listed vendors to identify three recommended partners, also known as implementation partners, channel partners, or digital agencies. Investigate each partner's methodology, size, capabilities, vertical experience, and culture. It is essential to speak with reference customers about their experience working with each partner.

The partner's success should be evaluated on its fluency with the selected product and how well it can fulfill the organization's requirements in a way that resonates with the business, senior stakeholders, and the overall strategy of the organization.

Keep in mind any company specific partner requirements such as: levels of insurance, certifications and/or classifications.

START BY:

❑ Assessing your current tech partners' strengths. Do the meet your needs?

If not:

❑ Consider if you prefer/require a local partner.

❑ What skill set gaps do they need to fill for your team?

❑ Do you want a partner to teach the team along the way?

❑ Engage an external consultant.

Next step
Conduct information exchange sessions ❯

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Conduct
Information Exchanges

Get to know your potential partners – technology, implementation, strategic, …

Because you now have a shortlist of vendors, you should forgo the traditional "dog and pony show" vendor demonstrations. Instead, consider on-site information exchanges with your potential partners. In this forum, you will have the space for a more meaningful dialogue, learn about the technology, and collect information which enables a shorter, more productive RFP process.

Holding face-to-face sessions with your potential partners before their RFP response submissions will provide you with time to share your requirements, budget, timeline, pain-points, and other concerns in detail and with more context, allowing them to provide a more thorough and tailored response.

Plan for full day session to allow for good interaction, discussion, and get a sense for how well you would work with their team.

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Conduct
Request for Proposal (RFP) Process

After the Information exchanges are completed, you are ready to conduct the RFP process.

The RFP process is an initial step in what will hopefully be a long, mutually beneficial partnership. Avoid the checklist approach by writing this essential document based on user scenarios. The added effort will garner more meaningful responses and create a collaborative environment for both you and your prospective partners.

By running the RFP towards the end of the selection process, you will be familiar with the vendors following the Information Exchange, and they will know enough about your organization and your needs to provide you with the best possible proposal.

Create a scenario-based RFP to enable respondents to provide context for their capabilities, rather than a checklist. And ample time for responses - we suggest 3 weeks – helps ensure a tailored, complete RFP response.

START BY:

❑ Avoiding RFP templates with extraneous, unnecessary requirements.

❑ Hosting a call to allow potential partners to ask questions as part of the RFP response process.

❑ Combine all data from the information exchanges and RFP responses in your final evaluation process.

Next step
Hold a proof of concept

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Hold
Proof of Concept (POC)

Schedule an on-site proof of concept to ensure the selected technology works in your environment as completely as it did during early demonstrations.

Ask your partner to demonstrate how the system will satisfy one or more of your specific requirements. This small investment of time and money will allow you to assess the additional qualities of your new partner and provide it with an opportunity to gather additional knowledge to predict the scope of your engagement more accurately. Upon completion, it is appropriate to request a refined proposal.

Proof of concept

vs.

Bake-Off

A bake-off pits two or more technology vendors against each other to provide a side-by-side comparison and pick a winner. A proof of concept provides evidence that the preferred technology vendor and/or partner can successfully satisfy your requirements.

START BY:

❑ Choose only one technology vendor and one partner to participate.

❑ Define the scope of work to be executed by the partner.

❑ Identify which integrations will be tested.

❑ Ensure the proof of concept team is made up of the individuals who will be assigned to your project.

Next step
Confirm partners or revisit options

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SUMMARY

Today's industry-leading customer experience management solutions offer far more functionality than ever before. This expanded scope, combined with the ability to integrate with other enterprise applications, further increases their overall value to the organization. However, this complexity also increases the risk of a failed implementation.

To maximize your chances of success, carefully select new technology and the partner who will ultimately customize, integrate, and deploy it on your behalf.

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