

A Practical Guide to Selecting Technology

That delivers user and business value.

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THE
CONTENT
ADVISORY

TECHNOLOGY SELECTION 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.

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1

Getting Ready Know what you have and how you use it

So, you think you have a technology problem? Gap?

You might, or you might not. In any case, before you start down the path of choosing new technology, here are the three things you should do first.

- 1. Document what is in your content technology stack and how (or if) people are using it.**
 - Document what you have in the stack.
 - Understand if/how the different tools are connected.
 - Look at who uses them, how often, and how much support is needed.
- 2. Document how work gets done.**
 - Document how work is supposed to be done and how it is actually done.
 - Find out what tools the teams use, and how.
 - Ask ... What works? What doesn't? Where the biggest pain points/gaps are?
- 3. Understand the capabilities of your technology and how it can be utilized to effectively complete the necessary tasks.**
 - Find out what tools the teams use, and how they use them.
 - Ask what works? What doesn't? and where the biggest pain points/gaps are?

START BY:

- Getting a complete mapping of current technology and how information, data, content, etc. flows.
- Understanding how work is actually getting done versus how it is supposed to get done.
- Align work processes with available technology capabilities – implemented, planned, and potential
- Identifying perceived versus actual functional gaps.

Next step
Validate need



2

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



3

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 focal needs

4

Determine focal Needs

The next step is to identify five to ten requirements that are the most relevant. We call these “focal 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. Focal 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 focal 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.



START BY:

- Reviewing and consolidating all requirements collected.
- Identifying trends and common themes from requirements.
- Identifying 5 to 10 focal needs for the technology.
- Identifying 5 to 10 partner focal needs.
- Validating the identified focal needs with key stakeholders.

Next step >
Create a technology shortlist

5

Create Technology shortlist

With focal 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 focal needs, then you should you consider other solutions. Existing relationships with partners are highly valuable

START BY:

- Determining the most relevant technology framework.
- Confirming your available budget for technology licensing and support, as well as partner for integration, strategy, and support costs.
- Assessing your existing partners' strengths.
*Do they meet your needs?
- Engaging an external consultant.

Next step

Create an
implementation
partner shortlist



6

Create An implementation partner shortlist

Use your focal 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 they 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?
- Engaging an external consultant.

Next step

Conduct information exchange sessions



7

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 to get a sense for how well you would work with their team.

Once all the sessions are complete meeting to rank in order of preference, rather than rate, the vendors and partners.

START BY:

- Defining scenarios for your potential partners to demonstrate how their product and capabilities.
- Including participants from all your key stakeholder groups.
- Providing your session evaluation team with a ranking score sheet to evaluate and capture notes for each session.
- Discussing, comparing, and holding a ranking session when they are all complete.

Next step

Conduct request for proposal (RFP) process



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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.
- Combining 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.

Once the POC is complete, you should have the information you need to make a confident decision.

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:

- Choosing only one technology vendor and one partner to participate.
- Defining the scope of work to be executed by the partner.
- Identifying which integrations will be tested.
- Ensuring the proof of concept team is made up of the individuals who will be assigned to your project.

Case Study

How this process help
save a healthcare
company time and
money

CASE STUDY

Healthcare organization opts to simplify rather than adding to tech stack

An assessment of current and future content, marketing, and customer experience technology needs.

TCA was engaged by this healthcare solutions company to assist them with an assessment and analysis of the company's existing and future content technology needs. The goal of this engagement was to provide recommendations to help guide the organization's content technology roadmap and address any gaps, particularly in terms of content management. Following the process outlined in this document, the primary outcome for the first phase of this engagement was to answer two questions:

1. Does the organization need a new content management system to best meet the needs of its internal and external stakeholders and audiences?
2. What opportunities for change – including business objectives, people, processes, and/or content itself – can be made in order to achieve a more effective and efficient content operational approach?

After completing the discovery, speaking with stakeholders, and executing the analysis on the gathered data points TCA assessed that:

- The organization did not require a new content management system at this time to best meet the most prioritized needs of its internal and external stakeholders and audiences. And,
- That there were many efficiencies to be gained through an improved, more efficient and effective content processes, and the establishment of a formal, organizational-wide content operations governance model.

RESULTS & RECOMMENDATIONS

TCA's recommended actions included:

1. Establishing an enterprise-wide definition of content.
2. Executing a complete content operations audit.
3. Expanding the use of existing technology and aligning processes to its capabilities.
4. Building, following, and maintaining aligned strategies for content and content-impacting technologies.

The organization followed TCA's recommendations and optimized its existing content stack to better support processes, drive efficiencies, and eliminate the abundance of manual and redundant efforts that were a part of its content management processes.

SUMMARY

Today's industry-leading content, marketing, and digital 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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