

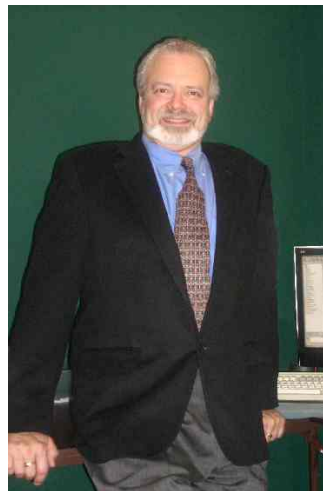
# Choosing the Right Software Package

A presentation by John Hedtke  
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## Speaker Background

John Hedtke has worked in high tech for 30 years and has written documentation and books for many leading software products. John owns and operates *JVH Communications*, a company that provides writing, consulting, and training services to private and government clients in all fields. A list of clients, projects, and other information can be found at his web site, *www.hedtke.com*.

When not otherwise occupied, John lives in Eugene, OR, where he writes magazine articles, plays the banjo, and sings Renaissance and jazz music with several choirs. John is a Fellow of the STC and served on the STC's Board.



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## What this presentation covers

- identifying the features you need, want, and don't care about
- determining other important selection criteria you may not have considered
- creating a list of selection criteria that reflects your needs and priorities
- identifying potential products
- evaluating products that may fulfill your criteria
- making a selection
- evaluating the product's fitness

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## Buying software is solving a problem

Whenever you buy software, you're solving a problem. The problem may be simple or complex.

Simple problems don't require much effort to choose a software solution.

Complex problems require a complete selection process.

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## Rule #1

The biggest cost of any business technology solution is rarely the technology itself; it's the training and implementation.

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## What does software really cost?

Besides the cost of the software, there's:

- setting up hardware and/or operating systems
- installing and configuring the product
- buying ongoing support and upgrades
- training
- learning the software
- cost of modules, add-ons, and third-party utilities for using the software

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## What does the wrong software cost?

- “Wrong” just means that the software doesn’t solve your problem effectively.
- It doesn't matter why a software package is wrong for you if it won't do what *you* need it to.
- Whatever you paid for the wrong software package was too much, even if it was free.

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## Assembling a selection team

- Get people who use or will be affected by the product.
- Involve as many decision-makers as you can.
- Look for strong opinions and an investment in getting things done.

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## Sample selection team

- Someone from IT: hardware/software requirements, interoperability with other systems
- Manager of the time producers such as a senior partner or VP of Engineering: how the product supports the company's goals
- Time keepers: usability, reality checking
- Executive assistants: usability, reality checking
- Accounting manager: interfacing with existing accounting systems
- Accounting clerks: usability, reality checking
- Someone from internal training/support (if this isn't covered by IT): usability, ease of support, ease of training

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## Rule #2

If you're doing it right, there will  
be politics involved.

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## Identifying the selection criteria

This is the **most important task** in the entire software selection process (and probably the most contentious).

Part of this task is the problem definition, so you know what problem the criteria are trying to solve.

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## Categories of selection criteria

The categories of selection criteria are:

- Required features
- Desired features
- Unnecessary/unneeded features

Look out for dependent criteria, too.

[Consider hiring a consultant!](#)

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## Rule #3

Ask yourself regularly if the problem you're solving is the true problem, or just a reflection of it.

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## Identifying the market

Look for products that may work for you.

- Check the Web (of course)
- Read magazines
- Check product round-ups
- Read reviews
- Look at advertisements
- Talk to people
- Attend seminars and vendor shows
- Post queries on listservs

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## Rule #4

Don't trim any products from the list right now. Just gather information.

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## Winnowing the list of products

- Eliminate any product that doesn't meet your minimum requirements...
- ...but check with the manufacturer for something that does
- Desired features
- Unnecessary/unneeded features

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## If you don't have any products left

- Re-evaluate your criteria to see if there are requirements that can be modified or dropped
- Expand your search. It's possible you haven't covered all the ground for possible solutions
- Look for a multi-product solution.
- It's possible that the product that you need truly doesn't exist yet or, alternatively, is no longer made. (It happens.)

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## Rule #5

Don't be surprised if your selection criteria change during the initial selection process.

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## Talking to the sales reps

- Create an RFP for the vendors.
- Include specific written scenarios for the sales teams to respond to.
- Set up a window when everyone will make their pitches.
- This is their job, so don't feel guilty if they have to work.

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## Running the sales presentations

- Make sure that a core team is at *every* presentation.
- Schedule only one presentation a day.
- Have the presentations in the same place.
- Give everyone listening to the presentation a sheet with the criteria.
- Limit attendance by non-team members.

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## Questions to ask

- What are the base costs, upgrades, customer support, training, availability?
- What kinds of third-party products are available?
- Are there add-ons or modules that can give you what you need?
- How good is the documentation? Are there third-party books about the product?
- How does the product work with other products you already have?
- Are people already likely to have some familiarity with the product as a result?
- Are there networking requirements?
- What's the history for bugs and software patches?
- Does the product include installation or continuing support?
- How secure is the product?
- What training options are there?
- How viable is the product?

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## Wrapping up the sales pitches

- Ask the reps for any additional info and a sample or demo copy of the product to try.
- Thank the sales reps for their time.
- Make sure you've got the contact info for the sales team for follow-up questions.
- Don't be surprised if there's a last-minute addition to the vendor list.

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## Rule #6

Keep the playing field as level as possible. You want to evaluate each product equitably.

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## Reviewing the materials

- Copy everyone's checklists and notes and distribute them.
- Review checklists, notes, and product information.
- Not everyone will have the same comments or even the same perceptions about a product from the sales pitches.

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## Making a decision

- Sequester the team.
- Process is important!
- Record product plusses and minuses on a flipchart, then summarize the opinions.
- Quantify your opinions where you can.
- Rank the products and discuss the rankings.
- You may want to do a proof of concept.

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## Rule #7

Ask yourself if you like or dislike a product because you're reacting to the sales rep instead of the product. If so, you're evaluating the wrong things.

Make sure the product meets your criteria and, if you can't stand the sales rep, talk to the company and see what you can do.

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## Buying the product

- Get hold of the sales rep and negotiate your final terms.
- It's possible that you won't be able to get your first choice.
- If so, go to your second choice.

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## Rule #8

Don't shut anything down with anyone until the software's installed... and maybe not even then.

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## Planning the implementation

- Identify the preferred configuration(s) for the software.
- Prepare any platforms the product requires
- Prepare any templates, add-ons, macros, and 3rd-party products
- Prepare the procedures for converting to the new product
- Start re-engineering the existing processes that will use the new product
- Set up your change management plan
- Plan and prepare the employee training program
- Set a schedule for training and implementation

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## Rolling out the product

- Phase the product in with selective rollouts  
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- Run it in parallel with the old product and systems.
- Both methods have their advantages.

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## Rule #9

Offer training for several months after the product is rolled out. Augment the basic training with an intermediate and advanced training to capitalize on the users' new knowledge after working with the product.

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## Evaluating the decision

- Wait long enough to gather data and see if there are problems.
- Make it easy to complain anonymously.
- Expect some static no matter what...
- ...but see if there's a theme to the complaints.

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## Rule #10

Hedtke's Law: "A decision that doesn't offend somebody couldn't possibly interest anybody."

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## What if you chose wrong?

- You can do everything right and still choose wrong.
- Admit that the solution isn't working out.
- Delay the rollout and/or roll back the product.
- Do some failure analysis: will the next product work or do you need to re-evaluate?

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## Rule #11

No matter what went wrong,  
choosing the wrong product will  
hurt.

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## Final considerations

- Selecting software is a long, tedious process, but it's the only way to be sure you get the right product.
- The consequences of failure can be disastrous.
- The real cost for any technology is almost always the time and training rather than the technology itself.

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## Resources

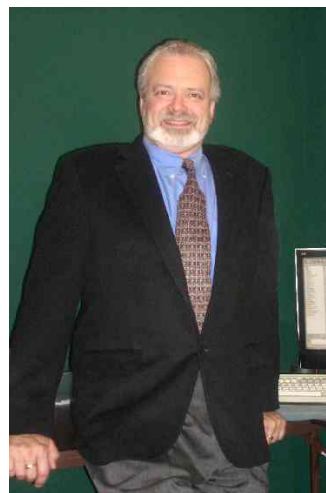
Download a copy of the slides at  
<http://www.hedtke.com/clouds.htm>

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## Thank you!

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if you have questions.  
(Please use the name of  
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so I can get to it quickly.)



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