Introduction

When selecting a new IT system you should review a number of systems to find the one that best matches your needs. Vendor demonstrations are critical. When well planned and executed they allow your project team to directly evaluate and compare the two or three most promising solutions.

Vendors often want to showcase their product's unique features, even if they are not relevant to your project. You can get vendors to focus on your needs by providing specific scenarios and a consistent framework to guide their presentations. Your project team will then be able to compare each product and determine which will best support your organization's unique business processes and challenges.

Here are some suggestions on how to structure vendor demonstrations so that your project team can select the system that most suits your needs.

Vendor Demonstrations

- *Preparation*
- Develop a vendor demonstration plan that defines the project team and its objectives, and includes a detailed task plan with due dates, and a process to track and resolve problems as they arise.
- Define, prioritize, and get management approval for, criteria for selecting software vendors.
- Identify the critical software requirements that the vendor must demonstrate.
- Work with the vendors to set a timeframe for the demonstrations, which may take from one to five days depending on the system scope.
- Develop scripts for all essential system requirements that must be covered in the demonstration.
- Organize the scripts into a logical sequence, based on key business processes, with start and end times for each segment.
- Establish a schedule for the demonstration with time for some key users to have "hands on" time with the system, time to review open questions, and due dates for action items.
- Distribute the scripts and schedule to your short list of vendors.
- Conduct a demonstration-planning meeting with each vendor, to review the scripts and schedule.
- Discuss logistics including timetable, location, equipment requirements, etc.
- Develop a process and tools for your project team to evaluate the demonstrations.
- Where possible, work with the vendor to use demonstration data that is familiar to your organization rather than generic demo data.
- Request additional information including standard implementation plans, standard contracts, updated price proposals, etc.

- *Demonstrations*
- Follow your schedule so you cover all relevant information.
- Document any questions not addressed in the demonstrations and any follow-up items.
- Coordinate with the vendor on open questions and issues, including assignments and due dates.
- Collect and summarize score sheets and debrief the selection team as soon as you can after the demonstration.

- *Selection*
- Consider other factors, such as RFP responses, reference checks, cost analysis, contract issues, and due diligence assessment.
- Ideally start the negotiation process with two vendors, in case your preferred vendor falls out during the due diligence process.
- Document key reasons for your vendor choice as well as dissenting opinions.
- Obtain management approval to proceed.
- Inform vendors of the outcome and next steps.

Background and Context

Refer to *High Level Overview of the System Selection Process* for context.

Vendor demonstrations are generally performed after requirements have been defined, and a short list of vendor solutions has been selected.

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