INFORMATION SYSTEMS

HOW TO PICK A WINNER!

Presented By Gary Allison
I. PROJECT DEFINITION

A. Goals
B. Objectives
C. Scope
D. Time Schedule
II. PROJECT ASSIGNMENT

A. Individual or Team
B. Employee and/or Consultant
C. Data Processing/User/Other
III. REVIEW BUSINESS AND MIS PLANS

A. Business Plan
   . Revenue Growth
   . Geographic Expansion
   . Diversification
   . Regulatory Changes

B. MIS Plan
   . Architectural Plans
   . Other System Requirements
   . Staffing Plans
IV. DEVELOP REQUEST FOR PROPOSAL (RFP)

A. Identify The Detailed Requirements Of The System
   - Current Environment
   - Functional Requirements
   - Hardware Requirements
   - Operational Requirements
   - Volumes/Frequencies
   - Implementation Strategies
IV. DEVELOP RFP (continued)

B. Prepare RFP Contents

. Background
. Present/Proposed Environment
. Application Requirements
. Proposal Conditions and Requirements
. Exhibits
  .. Application Software Summary
  .. Equipment Configuration
  .. Cost Information
  .. Maintenance and Support Capabilities
  .. Proposal Evaluation Criteria
  .. Calendar of Events
  .. Transaction Volume Projection
  .. Contract Provisions

. Specific Contracts/Forms
V. DEVELOP EVALUATION MODEL

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VI. SELECT PROSPECTIVE VENDORS

A. Bidding Lists
B. Newspaper
C. Professional Contacts
D. Literature Research
E. Professional Publications
VII. ISSUE REQUEST FOR PROPOSAL

A. Vendors Pre-Bid Conference
B. Questions/Answers
VIII. PROPOSAL EVALUATION

A. Requirements
B. Cost
C. References
D. Live Demonstration
VIII. PROPOSAL EVALUATION

A. Requirements
   . Evaluate Vendor Responses Per Criteria Developed in V.
   . Scoring Is A Technique For Evaluation And Should Not Be Relied On Exclusively In The Evaluation
VIII. PROPOSAL EVALUATION

B. Cost

. Hardware
  .. Original
  .. Add-Ons

. Software

. Maintenance
  .. Software
  .. Hardware

. Enhancements

. Operational
  .. User Personnel
  .. Data Processing Personnel

. Implementation Support

. Training
  .. Personnel
  .. Travel
  .. Phone
VIII. PROPOSAL EVALUATION

C. References

1. Recent Installations Of Similar Size
   1. Implementation Support
   1. Ongoing Support
   1. System Modifications

2. Installations Over 3 Years
   1. Implementation Support
   1. Ongoing Support
   1. System Modifications

3. Financial Stability

4. Location
VIII. PROPOSAL EVALUATION

D. Live Demonstration

- Identify Concerns To Vendor Prior To Demonstration
- Limit To 2–3 Vendors
- Limit Each Vendor to 2–4 Hours

Format

- Verbal Presentation By Vendor (Response to Concerns)
- Hands-On Demonstration By Vendor
- Questions/Answers
IX. IMPLEMENTATION PLANNING

A. Hardware Installation
B. Sequence of Applications
C. Data Conversion
D. Personnel

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X. VENDOR NEGOTIATIONS

A. Development Of Preliminary Implementation Plan
B. Identification Of Preliminary Implementation Team
C. Identification and Prioritization Of Key Issues
D. Development of Special Clauses
E. Test/Acceptance Criteria
XI. ANNOUNCE SELECTION
SELECTION PROCESS

PROJECT DEFINITION

PROJECT ASSIGNMENT

REVIEW BUSINESS AND MIS PLANS

DEVELOP EVALUATION MODEL
DEVELOP REQUEST FOR PROPOSAL
SELECT PROSPECTIVE VENDORS

ISSUE REQUEST FOR PROPOSAL

PROPOSAL EVALUATION

IMPLEMENTATION PLANNING

VENDOR NEGOTIATIONS

ANNOUNCE SELECTION
MAHALO

Grant Thornton