



Assessing the Marketplace: Choosing the Right Vendor for your Community

 **SNAPSHOT**

SPEAKER

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COMPETENCIES

Tools

MATURITY PHASES

CMM3, CMM4

TOP THREE TAKEAWAYS

Choosing a platform is a daunting experience at the best of times. Trying to do this unexpectedly and in a time crunch is considerably worse. This presentation helped to provide valuable insights on the vendor selection process.

1. **Ted is in the middle of an unexpected vendor evaluation.** He listed several best practices and lessons learned, but there were three in particular that he felt everyone should know going into this process.
2. **Be proactive.** Ted had managed to convince his senior leadership on the need to be proactive in the vendor evaluation process when they heard that Jive had been sold. However, the approval got derailed. Learn how Ted managed to get the process back on track.
3. **This was literally the best thing to happen to Ted’s career in years.** Wonder why? Ted explained how the vendor evaluation process helped him to earn respect from his senior management.

OVERVIEW

1. **Hillary and Ted set the expectations for the presentation upfront.** There are no silver bullets or blueprints for assessing vendors. This is one member's case study. It's his current perspective as he works in the trenches to assess a platform and, from a Network perspective, crowdsource allies and share knowledge with members.
2. **Ted is in this position now because he is a Jive customer.** Like many others at the JiveWorld Conference in May, 2017, he heard for the first time that Jive was set to be acquired.
 - a. Assessing platforms wasn't even on Ted's radar as Jive was successful in his company. However, a new parent company could mean disappointing changes were ahead. Ted needed a Plan B.

Ted had assumed that switching platforms was impossible; the process seemed too overwhelming. Furthermore, Ted was worried that a migration would be a massive productivity hit for the organization. To re-teach staff how to learn a new tool after all the time spent teaching them Jive seemed unfeasible. Now, his hand was forced. He had to make it work, no matter how impossible it seemed.

BEST PRACTICES

1. **Attend Vendor Conferences:** Not only will you learn, but even more importantly you can network with other customers to ask them the important questions. How well does this really work? How does the vendor treat you? How is their support? Ted met customers who had switched from Jive, so it begged a conversation about comparisons. This is far more valuable than any information you'll get from a vendor sales rep.
2. **Always Work to Develop your Network:** It's times like this that you truly recognize your network's value. People in your same position will have a different perspective than you on a problem. It's incredibly valuable to get that kind of experience and insight so that you are not just relying on the vendors. Your network will help you to sort out what's true and what's not true. There is trust in your network.
3. **Define your Plan:** Ted realized early in the project that he needed to define – both to himself and to the organization – the platform's end goal. He needed to articulate clearly what they had, what they needed and how and who could deliver it best.
 - a. Clearly define the purpose and benefit of the platform. Share the needs and how the platform can deliver on those needs. If senior leadership doesn't have a clear definition of that, you'll be defending your platform against the free platforms. Furthermore, you don't want to be several months into the project and learn that IT has a different vision than your vision.
 - b. Ted shared a strategy that thoroughly listed the objectives and a use case. The reason Ted did this was so that people understood the requirements. He stressed that Slack or Yammer wouldn't fit these requirements.
 - c. Avoid the use of the word "community." Ted used the term "Social Intranet." He thought that would be the easiest for people to understand. People know what an intranet is and when you add social to it, they seem to get it. It needs a homepage and a place where people can communicate.

BEST PRACTICES, CONT.

4. **Make the Vendor do the Work:** This was Ted's epiphany. After a while of testing different tools and realizing the learning curve, Ted became frustrated. Then it dawned on him to make the vendor do all the work. They want to sell their product and they have the experts.
 - a. You can ask the vendors to do lots of things for you because they want your business. If it's a reasonable request, they'll do it.
 - i. Ted listed out all of his requirements and asked for a Request for Proposal (RFP).
 - ii. For instance, Ted needed to understand how the notifications worked in simple terms so that anyone could understand it. If the vendor can't do that, there's a problem.
 - iii. Ted needed templates so that he could replicate and scale-up.
 - A. He asked to see how the vendor would set up a brand portal using templates that could be replicated as there are many people involved. Ted listed it out and gave them screen shots of their current community with what they liked and didn't like currently.
 - B. This actually helps the vendor because it allows them to be successful. By listing your expectations explicitly, you'll see if they can deliver not. If they can, you've learned something. If they can't, you've also learned something. Build these expectations into your RFP.
 - b. Don't ask the vendor if they can do something and then try to evaluate it. Instead, ask them how they plan to do something. Build a sandbox instance with all your requests and ask for a demo. This way, the vendor will basically build your community for you.
5. **Show vs. Tell:** When the vendor has to demonstrate your requests to you and you are in a room with your evaluation team (mainly IT), you will catch things and so will the others. By asking each of the vendors to present to the evaluation team, Ted didn't have to point out the issues. The rest of the team could see them, too. It was obvious when they saw these tools demonstrated one after another. Some platforms work better than others. Some are clunky and some are less integrated. Showing rather than telling took Ted out of the role of being the second-hand educator. It helps to simplify the winnowing process.

BEST PRACTICES, CONT.

6. **Get the Small Stuff Right:** Sometimes it's easy to forget the things that we already know:
- i. ***Make a Detailed Plan:*** This helps you to keep things progressing. Let your manager know how much you're doing, what needs to be done and the resources you'll need
 - ii. ***Don't Underestimate How Long this Will Take:*** It will probably be a year-long process or more. Guaranteed, you'll wish you had more time.
 - iii. ***Create a Vendor List:*** Leverage the legwork of others. There are people in TheCR Network who have done this and can help you with a vendor list.
 - A. Work to create a short list. Ted's process was to go through the vendor list as quickly as possible by discarding all the products that weren't relevant.
 - B. Know your criteria to help whittle down this list. Ted's first criterion was that the vendor had to be well-established in the industry. Use whatever criteria you can defend based on what makes sense to you using intelligent and researched sources.
 - C. Make sure you follow your company rules.
 - D. Partner with sourcing/procurement & IT. Ted is grateful that he partnered with sourcing and procurement as they advised him to get signed NDAs before talking to vendors. Similarly, collaborate with IT. Keep people informed and build relationships.
 - E. Help the vendor to sell successfully to you. It's not an adversarial relationship. Ted prefers to give them all the information he can so that the vendor can tell him whether or not something can be done. If you can work with them at this stage, you can work with them as your vendor. If you're doing this and they are replying with a canned sales pitch, that is clearly an indication of the relationship.
 - F. Insist on a dry run before presenting to executives. It's important that you see what the vendor is going to sell to the executives so that you can give the vendor proper feedback. You don't want to waste the executive's time.
 - 1) Help the vendor to present a targeted case. Weed out all the stuff the executives don't want/need to hear. If the vendor listens to you, they'll do well (and you'll know you can work with them). If they don't listen to you, they'll deselect themselves out of the process.

BEST PRACTICES, CONT.

7. Consider These Evaluation Best Practices Prior to Purchasing:

- a. Whenever a vendor says that their platform can do something, get it in writing. This way when it gets to the development team it won't incur a customization charge.
- b. Take advantage of the free (or at least reduced price) conference passes given to you by vendors. As Ted mentioned, it gives you a chance to speak with that vendor's customers.
- c. Consider doing a proof-of-concept test with your preferred vendor and ask them to set it up to your specifications. Contract for a limited time test with a limited set of test users from your organization.
 - i. Use simplistic use cases with your proof-of-concept to truly understand how the tool will work with your needs.
- d. Rather than invite users to randomly test the proof-of-concept site, set up a pilot where a team uses the site for a real purpose. It's hard to get valuable results from haphazard testing, and much more useful to have testers invested in using the tool and then get their feedback.
- e. A one-week pilot won't be enough. You'll find out much more information with a one-month test pilot and even more with a two-month pilot
- f. Consider using the term "configure" instead of "customize".
- g. These projects are 20% technology and 80% culture. Ensure that there is a good cultural fit with whichever vendor you choose.
- h. Look to others in the industry using the same platform. Ask to see how they've set it up and designed it. That will give you an idea of what the platform can do from a design perspective.

8. Hire an Evaluation Consultant: Ted hired a consultant for a small engagement during the evaluation process. The consultant did not choose the tool; they simply advised on the technology. The consultant had experience with several of the platforms, giving them a depth of expertise greater than Ted's IT team. It was a well worthwhile investment.

- a. Ted was able to sell his CEO on hiring the consultant by saying that it would ensure that they didn't pick the platform naively without realizing all the technology implications of it. Spend the money upfront so as not to make a huge mistake down the road.

LESSONS LEARNED

- **A huge lesson learned for Ted is to always be assessing platforms.** With his pre-conceived notion that migration was impossible, he never thought to assess other vendors. He will not let that happen again. Everyone should take the time to assess platforms every year in order to keep on top of the players and what they offer. He could have shaved months off of this process if he had been doing this already.
- **Ted also learned that there are people out there who can help with this process,** i.e. to take the API from one tool and use the API in the other tool to map and migrate content from one platform to another. The good news is that you don't have to do it on your own. The bad news is that it's expensive. Fortunately, it wasn't as expensive as Ted imagined, which made it feasible.
- **Never underestimate the power of your own personal network.** The bonus of Jive making this announcement at JiveWorld was that Ted's network was there. Everyone was leaning on each other. This really helped to reduce everyone's stress level. There was hope and possibility that came from networking with each other. The news would have been much more devastating otherwise.
 - Ted talked to Jim Storer of TheCR. Many CR members are Jive customers. Jim set up a private group in TheCR Network to help Jive customers learn from each other and share ideas.
 - A Working Group was established to problem solve. If everyone was in the same boat, it didn't make sense to work on the same problem separately. Sharing was the only effective way to get through such a huge task in limited time.
 - Ted's vision was to have a place in TheCR where the vendors could present to the group, ask questions and play in the sandbox together afterwards to help test out the products. There are a lot of sharp people in TheCR and Ted wanted to have the benefit of their thoughts and observations, especially for things he might have missed.
 - It didn't quite play out this way because people are busy. Participation dwindled when it came time to testing and evaluating, but there was good attendance for the demonstrations.
 - Ted recommends setting up the Working Group, build on what you learn together and figure out what will make it work even better.

LESSONS LEARNED, CONT.

- **He got executive buy-in to recruit others in the organization to help with the vendor evaluation process.** Ted learned this lesson the hard way. Ted's CEO is very supportive and when he first briefed him on the urgency of evaluating these platforms, he had support. Ted was encouraged to get organizational buy-in as he went through the evaluation process. Ted recruited close to 50 people across the organization at all levels, including 20 directors. However, when he announced this to the senior leadership team to let them know that all these people were going to be involved, it caused a panic. Senior leadership didn't want that kind of distraction taking away from what they deemed as more important priorities. Ted had to re-group and patiently re-make his case.
 - Ted reiterated why this project couldn't be avoided. He stressed the urgency of the situation. Jive is going through an acquisition and the outcome is unknown. If they don't assess other vendors and have a Plan B, the annual contract with Jive will come due and the new company could raise the price substantially. Without a Plan B, they will have no choice but to pay. As well, they trusted the relationship with Jive, but this new player is unknown. The new company could change the terms of the agreement. They had to do their due diligence or face the consequences.
 - Ted also scaled back drastically to 7 stakeholders and only 2.5 hours of their time. He was able to revive the project as a result. It was a telling moment for Ted. He thought he was doing what the executives wanted, but was unexpectedly derailed.
 - Beware of the things that are outside of your bubble. You're thinking differently than senior leadership when it comes to priorities. The biggest hurdle for Ted is proving to his CEO that this migration can be completed without a major disruption to the organization. That's a big challenge. Ted has some plans that they are working on, but they aren't there yet. They only have a germ of an idea, but it's at least moving forward.

ROUNDTABLE REPORT

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LESSONS LEARNED, CONT.

- People discussed why they avoid the term “community” internally:
 - Engineers think of community as a developer community.
 - Internally, staff think of customer support when they hear community.
 - When asked to use community, sales people think that it pushes their customers away from them. They prefer face-to-face or on the phone and are very anti-community. That’s the real challenge because sales people are afraid that community will erode the relationship.
 - Another member said that they can’t use the word community at all internally. It has baggage attached to it from a previously failed exercise. It has to be a word that has a business value attached to it, i.e. it describes process efficiency or speed to market.
- Evaluating platforms was literally the best thing to happen to Ted’s career in years. Ted shared this so that others could look at this exercise more positively. Ted’s leadership has a new appreciation for his expertise and experience, as well as his ability to tap into his network.
 - Ted feels more valued. His senior management listens to him more intently now as he educates them on this process. He has their attention because they know they’re going to own this decision. If they decide to stay with Jive, they own that decision. If they leave Jive for a new vendor, they own that decision, too. Ted is a valued advisor.
- Ted sees this as an opportunity to deliver a better platform, or at least one that is comparable. The new platform architecture will better suit their organization. Even if Ted just gives them better information architecture with the exact same tool, they are ahead of the game.
- Ted was asked how he created the short-list of stakeholders the second time around. Ted replied that originally, he had power users on the list who were very enthusiastic. However, they weren’t senior enough to be influencers. Therefore, the second time Ted focused on the director level or higher. He managed to get quite a few VPs. When it came to cutting back that list, he had them self-select out. Only those who truly had the time and commitment stayed on the list.

ROUNDTABLE REPORT

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LESSONS LEARNED, CONT.

- Participants listed the red flags to watch for in the migration process:
 - Make sure that you involve IT so that you can ask the right questions.
 - Make sure that you are speaking the same language as the vendor. For instance, you might have a completely different definition of the term “community” than the vendor. Set the vocabulary from the beginning.
 - If you ask a vendor if their tool can do something, they will always say that they can do it. However, they won’t be able to replicate what you are currently doing and you don’t want to be helping them build a tool that they can pass along to their customers.
 - Use cases are very important for the vendor to be able to help you understand whether or not they can do what you’re asking of them. Then you need to verify it with others that have experience to see if it works without customization.
 - If a vendor immediately says that they can complete the migration in 3 months without even knowing your system and the amount of content you have, run for the hills.
- One participant wondered how to safely grant administrative rights to vendors when testing a new platform:
 - Lean on your IT partners and make the vendor sign an NDA (Non-Disclosure Agreement).
 - Evaluate different scenarios using dummy data.
- In summary, the three main points that Ted learned from this experience were the following:
 - Continually develop your network.
 - Make the vendor do all the work.
 - Never stop assessing the vendor marketplace.