



## Introduction

A CMS has to be seen to be believed! An essential element of the selection process is to arrange for vendors on the short list to give a presentation of the way in which they plan to meet the objectives of the organization. This should not be the first time that the selection team has seen the product. The complexity of even entry-level products is such that even in a two-hour presentation only a relatively few features of the CMS will be covered. To be useful the vendor presentations have to be managed with military precision, and require as much commitment from the project team as any other element of the procurement process. The words 'demonstration' and 'presentation' are used with specific meaning. Vendors are good at demonstrating how good their product is at doing the things that it is good at. The challenge of a presentation is to make sure that the product does all the things that the organization requires within specific business, technology and organizational constraints.

At the heart of the evaluation process should be the personas and scenarios set out in the statement of requirements. At the present time vendors are not yet as comfortable with this approach to meeting requirements as they will need to become.

## How many vendors?

In deciding how many vendors to place on a short list, and then invite to give a demonstration, the time required to watch the presentation and to discuss the findings has to be taken into account. At this stage of the process there should perhaps be no more than four, or five at the outside. If the short list is still a long list, with more than five vendors, then there should be a re-evaluation of the written proposals.

One practical reason for setting the number at four is that ideally each vendor should be allocated one day for the presentation. The presentation itself should take only a couple of hours (see below) but there will no doubt be questions raised that take more time. The review by the project team should take place immediately after the presentation. If a series of presentations is held on the same day then there is the real danger that there will be confusion about which product presentation covers which features. Such is the impact of the CMS on the business effectiveness of the organization that allocating anything less than a day devalues the entire process.

### **Assessing the written proposals**

The tender documents themselves can provide important information that will assist with the vendor selection, and it is well worth reading them carefully to see what has been omitted or glossed over:

- The sales team may have cut and pasted text from an earlier proposal and not fully checked to make sure that the details are consistent and accurate.
- Particular care needs to be taken with information about reference clients. It is worth checking that the vendor has actually carried out the work. Some CMS vendors have reference sites that their software integration partners can use in their proposals with the intention of demonstrating the capabilities of the software. It may not be either clear whether the partner themselves has actually carried out the work.

The tender document should also be taken as an illustration of the way in which the project documentation will be presented:

- If the tender is a mix of different styles, with an inadequate index and a variable approach to paragraph formatting perhaps the project documentation will look the same, and be equally as difficult to assimilate.
- Tenders are often padded out with irrelevant information, such as the unedited C.V.s of members of the project team or the history of the company.

- There is little point in padding out the tender document with copies of the annual filings of the company when only one member of the selection panel will be able to interpret them.

This is why it is essential to set out in the statement of requirements just how the tender should be prepared and submitted.

### **Developing the short list**

The selection criteria should be set out in a way that enables the selection panel to quite quickly reduce the number of vendors down to a manageable total. Certainly there ought to be four or five on the short list, but probably no more than that. The process of the detailed evaluation, vendor presentations and subsequent meetings to clarify details is quite time consuming enough without extending the process to ten or more vendors.

If the short list is indeed as long as ten then the initial selection criteria, and arguably the original statement of requirements, were probably not rigorous enough. That, however, is water under the bridge, and an effort should be made to reduce the 'long' short list of ten to a 'short' short list of four or five. If the selection process has involved the use of a Government-approved list of vendors, or an advertisement in the Official Journal of the European Commission, then there might be fifty or more tenders to work through. The only way to manage this is to have a very clear idea of just a few top-level selection criteria.

### **Weighting and ranking selection criteria**

At the heart of the formal evaluation process is the initial development of a weighted list of functionalities and other criteria. There is no point at all in just listing functionalities and then seeing how many each vendor can comply with.

How many criteria are used in the evaluation depends on the risk that could be associated with the vendor in fact failing to meet the one of the criteria. If for each of the criteria there is a short statement about the impact of the lack or achievement of the criterion on the success of the implementation then this process will substantially reduce the overall risk of the project.



The process involves getting the selection panel to agree on the selection criteria. These could be the use of XML, the approach to migration of legacy content, and the ease with which templates can be modified. Mandatory criteria will probably be budget, and the confidence the vendor has in meeting the implementation dates. However, neither can be evaluated on the basis of the initial proposals.

The relative importance of these criteria is then weighted on a scale of 1 to 4 (4 being mandatory). As each vendor comes in to make their pitch the panel gives them a ranking of 1 (no idea) to 5 (meets the requirement completely). Multiplying and summing the ranking and weighting scores produces an overall score for the vendor.

An example for the purposes of illustration only is given below in Table 10.1.

**Table 10.1** Illustration of a weighted and ranked evaluation of vendors

Requirement	Weight	Vendor A score	Vendor A Rank	Vendor B score	Vendor B Rank	Vendor C score	Vendor C Rank
Dual Novell Groupwise and Microsoft Active Directory support	4	5	20	5	20	5	20
Support for e-Government Metadata Standard	4	5	20	5	20	4	16
Apply metadata based on content type	3	5	15	4	12	1	3
Complete site roll back	3	2	6	3	9	2	6
Existing clients in local government on same version	3	2	6	2	6	5	15
Creation of documents in pdf format	3	3	9	2	6	5	15
Server-based licensing	2	4	8	2	4	2	4
Templates easily developed by the client	2	4	8	3	6	4	8
<b>Total</b>			<b>92</b>		<b>83</b>		<b>87</b>

Note: The requirements are purely illustrative

It is important not to place too much reliance in the final score. The benefits of this approach are in the discussions around the initial selection criteria, and the allocation or the weighting and ranking scores. The process should ensure that all (or at least most) hidden agendas are revealed, and that perhaps one of the criteria needs to be split into two.

It may well be the case that there is some ambiguity in the statement of requirements, so that some of the vendors may have interpreted the requirement in one way, and some in another. If this is the case then the ambiguity needs to be resolved and the outcome communicated to all the vendors.

At the end of the process the outcome should be four or at most five vendors. A decision needs to be made as to whether the unsuccessful vendors are told why they have not made the short list. There may be a rule in the procurement process that requires this to be done.

## Open-source CMS

With the growing interest in, and availability of, open-source software this might be one of the options to be considered in the evaluation process. If the open-source software has been productized then the product can be assessed against commercial products, but if there is only a proposal from the IT department to build a CMS using open-source software the selection process will be like comparing apples and oranges.

This is where a focus on what the software can deliver in terms of a finished CMS rather than on the functionality of the software is absolutely essential. By using the support networks for the software, organizations that have similar requirements to those set out in the SoR can be identified and visits made to these organizations at the outset of the process to understand how the software has been developed, and the problems during the development process and implementation.

## The selection panel

Much of the work to this point has been carried out by the CMS project team. Now is the time to broaden the team to include other



stakeholders. The selection panel should comprise:

- 1 the CMS project manager, for obvious reasons
- 2 an experienced content author who can ask questions about the authoring interface, metadata management, etc.
- 3 a representative from IT with both server and network knowledge. The network knowledge is essential where the CMS is to be integrated into a corporate network through the network directory, with appropriate permissions based on the network security model
- 4 the senior manager who is sponsoring the project, to show the vendor that a key decision maker has taken the time to be present
- 5 if appropriate, a representative from the procurement department to ensure that organization rules about the procurement process are complied with.

A panel of five is quite large enough. The panel has to be consistent throughout the presentations. There has to be comparability, and if three different IT staff turn up to the presentations that will be lost. Getting all these people in the same room at the same time, and at a time when the vendors can also be present with the appropriate personnel is the main reason why the vendor presentation stage can extend the overall schedule at a critical point of the procurement process.

### Roles of the selection panel

Each member of the panel should be briefed on the points they need to watch out for, based on prior demonstrations. A set of agreed questions should also be developed, so that every member of the panel is involved in the process. It is quite easy to fall asleep in a CMS presentation! As well as what panel members say it is also important to manage what they don't say, especially in a public-sector procurement situation. The best way to do this is agree that only the CMS project manager will speak about any issues other than the agreed questions.

The selection criteria used for the development of the short list will almost certainly need to be modified for use in arriving at the

choice of vendor. This is because the emphasis needs to shift from what the product does to how well it does it. Even in a pre-planned presentation it should be quite easy to see how quickly (for example) metadata can be added to a piece of content.

Another factor that needs to be considered in the evaluation process is how well the organization feels it can work with the vendor. It is unlikely that the vendor can confirm and have in attendance the project manager for the CMS implementation but it is important to take account of how well the team members work with each other, how well the questions are dealt with, and the overall level of personal commitment that is in evidence to working effectively with the organization.

### Preparing for the presentation

**Room** – The choice of rooms is critical. The main room should have good ventilation, and the screen should be in a position where everyone in the room can see it, without image resolution being impacted by sunshine. There should also be an adjacent room where the selection panel can wait for the vendor to prepare the presentation, and where the panel can retire to, either at the end of the presentation or if there is a need to take ‘time out’ during the presentation because of an issue or problem that has arisen.

**Equipment** – The vendor’s requirements for power sockets and internet connections should be established in good time. The weak link in a presentation is often the data projector, which is either noisy or has insufficient power for a large room. A back-up projector has to be available, even if it means hiring one. The project schedule will be quite tight enough without having to rerun a presentation because the data projector failed. Having a flip chart available can also be helpful to capture specific pieces of information.

**Recording the presentation** – It may also be worth considering videoing the presentations, so that at the end of the week memories can be refreshed about just what was said in response to a specific question. The agreement of the vendor should be sought in advance, and a commitment made to send the tape back to the vendor at the conclusion of the review. In that way the vendor is



able to use the tape for training purposes and also knows that it will not be used at the staff party for amusement.

It is essential that the presentation is not just a generic sales pitch, and this can be avoided by providing each vendor with some sample documents and style sheets. In the case of a website the vendor will be quite capable of grabbing style sheet information from the public website, but will not have this opportunity in the case of an intranet.

### On the day

The timing of the presentation should be clearly set out in writing to the vendors. The shaded panel opposite gives an example.

### The review process

Taking into account all that has been learned over a period of perhaps several days requires time and good leadership. The irony is that the work that has been carried out in defining the requirements and in selecting the short list means that the differences between the vendors are quite small and not directly comparable. One vendor may have a very good text editor and another a very user-friendly metadata tagger.

### Visits to reference sites

At this stage visiting some reference sites can help in deciding between closely matched vendors. However, there is sometimes a reluctance on the part of vendors to be too accommodating with regard to visits to reference sites. Obviously the sites themselves do not want to have their work disrupted on a regular basis so the vendor will look for a strong commitment to purchase before setting up one meeting, let alone two.

They will almost certainly want to be closely involved in the site visits because their client could be facing difficulties which are in fact due to a lack of understanding of the CMS software rather than any fundamental flaw in the CMS.

**Company background and product history** **10 minutes**

You should watch for the extent to which this initial section of the presentation is tuned to the needs of the organization.

**Meeting the scenario requirements** **50 minutes**

The statement of requirements (Chapter 9) sets out some scenarios for content authoring and publishing, and it is these scenarios that form the basis for the evaluation of the CMS product. This section must not be rushed, because meeting the scenario requirements lies at the heart of the selection process.

**Initial questions** **10 minutes**

It is tempting to ask questions during the presentation, but this should be avoided because it is easy to then skip over a process in the desire to stay on track. This is where a video record can be very useful, because a particular process can be reviewed in the break-out session and specific questions asked within the overall context of the presentation.

**Other product features** **30 minutes**

The scenario presentations will give the vendor a chance to show only a comparatively small but important number of features. This next period of time can be used by the vendor to show other features that, based on their response to the statement of requirements, gives them a competitive advantage. This section of the presentation should also cover the vendor's approach to project management.

**Break out** **30 minutes**

After 90 minutes everyone will need a break. The selection panel should use this time to discuss the outcomes of the presentation, agree the list of questions that need to be raised, and also agree who will ask each question.

**Questions** **30 minutes****Vendor recapitulation** **20 minutes**

The presentation has taken over two hours, assuming that everything has run to plan. It can be valuable to give the vendor a chance to summarize why they offer the best solution to the needs of the organization.



## How much?

Even at this stage it is unlikely that there will be a commitment to a price from the vendor. The lower the level of customization involved the easier it is for the vendor to be forthcoming about the licence cost and any associated professional services for template design, technical implementation and training. As the functionality of the product increases so does the difficulty for the vendor in providing a firm quotation. The problem is more acute with open-source software, where the licence fee may be zero or minimal, and all the costs are in the development work involved.

## Scoping study

The next step with most vendors is to undertake what is often referred to as a 'scoping study'. This is a short project, typically a week in duration, during which time consultants from the vendor look in considerable detail at the IT platforms, network architecture and server architecture, and also at the current website or intranet. The objective is to quantify the licence fee and the professional services work that will be involved in the implementation.

The cost of the scoping study usually has to be borne by the organization, because at this stage there is no commitment to proceed with the vendor concerned. Some vendors undertake the work at no cost if the contract is then placed with them, but reserve the right to charge if this is not the case. The vendor will also stipulate that the report of the scoping study cannot be passed on to a third party, such as another prospective vendor.

Once this work has been completed the vendor is in a position to confirm the price of the software and implementation, but rarely will this be a fixed-price quotation. Certainly the software licence element will be but any professional services work will be priced on a day-rate basis so that unforeseen problems (especially content migration) can be charged for at cost.

Organizations like to have fixed-price quotations, and indeed may not be able to enter into what is often referred to as a time and materials contract under their internal procurement rules.

One of the outcomes of the scoping study is that the organization feels that the vendor will not be able to meet their requirements, and that is why it is important to have a vendor in

reserve. However, it may well be that the second-place vendor is there because they are the best of the rest, rather than being a close call with the vendor of preference. At this point a substantial amount of courage is needed within the organization to decide that the gap between the statement of requirements is so wide in critical areas that the process should not proceed to selection, but rather that the project team should go back to the statement of requirements and look again at the requirements and the criteria for selection.

### **Contract negotiation**

The conflict between the ambition on the part of the organization to agree a fixed-price contract and the reluctance of the vendor to do so makes the negotiation of the contract a potentially difficult and time-consuming business. The vendor wishes to minimize their risk and maximize their profit, and finding a compromise can be quite a challenge.

### **Feedback**

A decision must be made as to the extent of any feedback that is provided to the unsuccessful vendors. Depending on the procurement rules of the organization, written feedback may be either mandatory or forbidden. If there is to be feedback it is important to state the nature of the feedback in the statement of requirements. This could range from a letter indicating the main reasons for not selecting the CMS to a copy of the formal evaluation of the CMS. The requirements of any Freedom of Information legislation, especially in the UK and the USA, need to be taken into consideration. There may be grounds for vendors applying under this legislation to have a copy of the evaluation report so that they can be satisfied that the procedure does conform to the procurement policies of the organization.



## Summary

- Vendors are good at demonstrating how good their product is at doing the things that it is good at. The challenge of a presentation is to make sure that the product does all the things that the organization requires within specific business, technology and organizational constraints.
- At the heart of the evaluation process should be the personas and scenarios that are set out in the statement of requirements.
- The short list is made after the initial development of a weighted list of functionalities and other criteria. There is no point at all in just listing functionalities and then seeing how many each vendor can comply with.
- Even at this stage it is unlikely that there will be a commitment to a price from the vendor.