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WICHE Cooperative for Educational Technologies

TALKING POINTS

How to Successfully Choose and Develop a Relationship with Vendors

All institutions use vendors to support their infrastructure and support teaching and learning. These services come in all forms: hardware, software, and services. Contracts can range from small amounts of money to millions of dollars. Most faculty and administrators do not have vast experience with contract negotiations, but both institutional personnel and vendors want to develop good relationships.

WCET members sought advice both in developing those good relationships and in assuring that the contracts leading to fulfilling their institutions' needs. With input from the WCET Steering Committee, a small group of WCET members, representing both vendors and institutional personnel, created *WCET's Best Practice Checklist for Choosing and Working with Vendors*. Since it is an extensive checklist, key highlights are presented in this document.

WHY ARE YOU THINKING OF CHANGING?

The first step is to ask introspective questions in a way that yields honest answers that represent all affected constituencies.

- What exactly are we trying to do?
- What is the motivation or motivations to make a change?
- Who are the stakeholders?
- What criteria should be considered when investigating solutions?
- How will we define and measure success? Return on investment? Satisfaction? Other measures?
- Is dissatisfaction with the current state of affairs adequate to make the change?

- Did we obtain input from all affected constituencies?

One definition of consensus is that no one objects to the point that they will block your proposal. You do not need perfect agreement, but there is no sense in proceeding if one set of stakeholders is intent on derailing the process.

SHOULD YOU BUILD OR BUY? ...OR SHARE?

The classic question was whether an institution can build the needed product or service internally or whether it should obtain vendor support. Maintaining your institution's core competencies is often wise. For technologies, the pace of change is quickening. Former Arizona State University CIO Adrian Sannier outsourced the institution's email because improvements would happen at Google-speed. In recent years, sharing has emerged as a third option. Open source software and open content provide attractive options for those who can provide the support to implement them.

> When searching for new products and services, we want to be successful in selecting a vendor, writing a contract, and developing an on-going relationship with the vendor.

WHAT ELSE SHOULD WE CONSIDER?

There are both internal and external considerations for engaging a vendor. Externally, make sure you are looking at any (state or federal) regulations or (institutional or specialized) accreditation requirements when using a vendor's services.

Internally, become aware of the many processes in place. Work with your purchasing department (on their rules), legal department (in creating a Request for Proposal or RFP), and working with your IT unit to make sure you can implement technology-based services. As part of these discussions, build a timeline. When do you need to have this service in place? How long will it take to review, select, and implement the contract with the vendor?

HOW DO WE FIND THE RIGHT VENDOR?

In selecting a vendor, create a process that is as professional, well-documented, and as open as possible.

- Gather the invested stakeholders into a focus group to finalize and prioritize a list of needs.

- Decide between essential and "nice to have" features by creating a rubric for reviewing and evaluating the vendors.

- Develop an RFP, if that is your institutional process. Include a process for responding to vendor questions.

- Set a timeline for the search and stick to it as best you can.

- Review and evaluate the products. Test products, if possible.

For LMS selections, also see *A Guide for Planning Communications During LMS Selection, Implementation, and Beyond:* http://www.wcet.wiche.edu/wcet/docs/resources/GuideforPlanningCommLMS%20CIG110410.pdf

WHAT SHOULD WE INCLUDE IN OUR CONTRACT?

Before you settle on a contract with a vendor there are some things to consider:

- Map out the budget impact, both short and long term.

- Make sure the contract reflects what you need from the product or service. Your vendor will want to make sure you are getting exactly the service you need. They will welcome your questions. If you feel you are not getting the answers to your questions then maybe another vendor will provide a better

relationship. It is about forming a good relationship with the vendor.

- Consider upgrade procedures, complaint resolution, and exit clauses as part of the original contract.

- Assemble the internal infrastructure to support the product or service.

- Have your legal department review the contract before it is signed. This protects both you and the vendor.

IMPLEMENTING THE PRODUCT AND MOVING FORWARD

As the institution moves forward with implementing a service or product:

- Make sure there is adequate training.

- Create plans for making adjustments on the fly or to handle emergency situations.

- Allocate sufficient personnel to handle the rollout of the new service or product.

- Develop and execute marketing and training plans.

- Obtain immediate feedback from users to adjust features or training.

Working with your third party vendor can result in a great relationship. It is important to carefully consider all aspects of vendor relationship and how to get there. For more details, read *WCET's Best Practice Checklist for Choosing and Working with Vendors:* www.wcet.wiche.edu/wcet/docs/talking-points/VendorBestPracticeChecklist.docx.

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