Software Evaluation Best Practices

Panelists

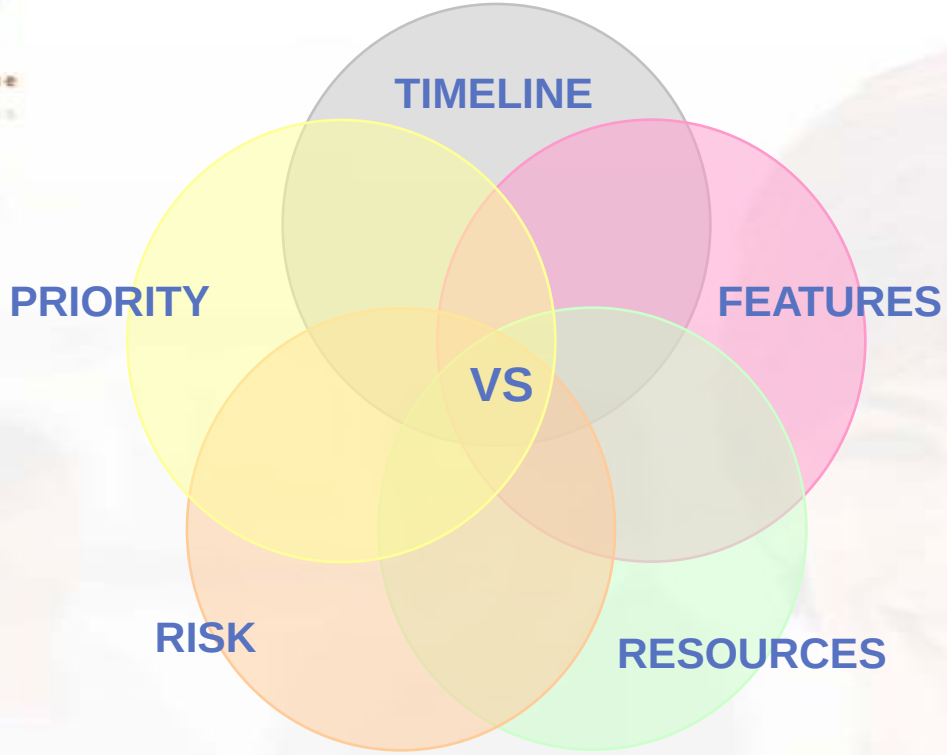
- Allison Holman
- Jennifer Steele
- Candia Sweet
- Charlotte Washington

Business Drivers

- Attorney suggestions (iPhone)
- Software no longer supported
- New software (functionality) available
- Upgrade (hardware or software) causes other upgrades to happen
- ???

Software Evaluations

- Selecting what to Evaluate
  - Demos by Vendors
  - Highly recommended on ILTA ListServs
  - Select 2 or 3 which meet your basic needs
- Evaluation Tools
  - Copy of Software
  - ILTA Groups
  - Call References
  - Install on your own environment
- Who are Your Evaluators?
  - IT only or Users also?



	Timeline	Priority	Features	Resources	Risk
Fixed		✓			✓
Chosen	✓		✓		
Adjustable				✓	

Make a selection

- After thorough testing, based on…
  - Stability
  - Functionality and Ease of Use
  - Look and Feel of the Interface
  - Match to your Current Environment
  - Footprint on Network Backbone
  - Cost
    - How important is cost in your decision-making process?

The Pitch

- Critical Considerations
  - Be certain that you understand the culture and political process of your organization
  - Identify and understand the motivations of the decision makers
  - Focus on Optimization of Value
  - How does the software meet the needs of the Firm?
  - What if the answer is “No”?
    - Where do we go from here?

Pilot Points

- How detailed is the pilot?
- What do you need to know as a result of your pilot?
- Are you committed to this software if issues arise?

Firm Communication

- Is your communication with the entire organization or just the pilot group?
- What is your communication goal?
  - Soliciting Input?
  - Have you made a decision and are now looking for buy in?
  - Has this implementation been mandated?
  - Does this implementation repair an existing issue?

Lessons Learned