

Selecting CMS Tools

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Workshop Focus

- ◆ Selection of a CMS Tool
 - Setting expectations through planning
 - Information gathering
 - Balancing objective vs subjective decision making




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Action!

- ◆ Define the scope of the Tool Selection process:
 - Organisational scope
 - Process scope



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Project Management

- ◆ Budget & Plan for:
 - Demonstrating due diligence in the selection process
 - Being able to win the case for the benefits of CMS tool in your business
 - Business sponsoring and funding of the selection process
 - Getting different departments involved
 - Multiple Hats
 - ◆ Technical /subject matter expert
 - ◆ Project manager, Spec Writer, Tester etc



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Managing Expectations

- ◆ Source of Expectations?
 - People : Developers, CCRM, Business, Legal
 - Partners: Suppliers, Customers, Software Vendors, Outsource Providers
 - Process: CCRM, Development, Service Management
 - Product: Managed Applications, Media, Infrastructure, Documents
 - Place: Sites impacted
- ◆ Types of Expectations?
 - Why : When : What : How : Where : Who : Which
 - Risk,
 - Benefits: Financial, Performance, SLA targets
 - Total Cost of Ownership – including evaluation
 - Organisation & Cultural impact



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Requirement & Information Gathering

Who From	How obtained
Business Sponsors	Interview, Project Planning, Use Cases Workshops
IT Organisation	Key Stakeholder interviews, Project Review Use Case Workshops,
Service Management	Process Audits, Reviews Use Case Workshops
Application Characteristics	Research, Industry reports,
Infrastructure	Audit, Current CI list, Technical Architects
HW/SW/Doc Management	Process Audits, Reviews Use Case Workshops

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Action !



- ◆ What do think the common requirements are for a Configuration Management System?

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Getting to a Good Decision

- ◆ Budget & Plan For
 - Three Stage approach
 - Stick to the plan
 - Communication lock down
- ◆ 3 Stages:
 - Stage 1 Market Appraisal
 - Stage 2 Tool Appraisal
 - Stage 3 Pilot Installations



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Stage 1 Market Appraisal

<ul style="list-style-type: none"> ◆ Information Gathering: <ul style="list-style-type: none"> ▪ Web <ul style="list-style-type: none"> • BCS / CMSG • CM CrossRoads • Google ! ▪ Industry Reports <ul style="list-style-type: none"> • Gartner • Bloor ▪ Exhibitions ▪ Vendor Websites 	<ul style="list-style-type: none"> ◆ Appraisal <ul style="list-style-type: none"> ▪ Top Level Checklist <ul style="list-style-type: none"> • Functionality Filter <ul style="list-style-type: none"> ▪ 5 - 6 points • Solution Structure <ul style="list-style-type: none"> ▪ Single / multiple products ▪ Database solution ▪ Corporate Constraints <ul style="list-style-type: none"> • Preferred vendors ▪ Initial Demo
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~ 4 possible contenders

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Stage 2 Tool Appraisal



- ◆ Request For Information:
 - Detailed requirements
 - Use Cases
 - Exploiting known product weaknesses
 - Getting references
- ◆ Scoring:
 - Must, Should, Could
 - Design a weighted scoring approach for "Should"s & "Could"s
- ◆ Get to Best of Two
 - Demo against RFI to confirm selection

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Stage 3 Pilot Installations



- ◆ Budget & Plan for a pilot
- ◆ Risk Cost for two
- ◆ Spec out the installation & initial configuration
- ◆ Start with top scorer
 - Monitor Installation
 - Test with Use Cases
 - Obtain user feedback on attributes
- ◆ If Pilot one fails then go to Product 2
- ◆ Review & Choose

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What to watch out for

<ul style="list-style-type: none"> ◆ Know who the decision makers are (may not be you!) ◆ You need sponsors / crusaders at all levels ◆ Know your own internal buying process and key players ◆ Ensure the Annual Operating Plan includes your project. 	<ul style="list-style-type: none"> ◆ Prevent scope creep ◆ Understand the full impact of CMS ◆ Avoidance of sign-off on specs ◆ Over long specifications ◆ Stick to <u>what</u> you want to do, not <u>how</u> the tool should do it
<ul style="list-style-type: none"> ◆ Sales may not show the whole truth ◆ Trying to know everything about the product ◆ Making one product a winner too early 	<ul style="list-style-type: none"> ◆ Assuming the vendor knows your processes ◆ Outsource partner involvement – it will not be free ◆ There is no common CCRM Language

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Thank You

More information
www.bcs-cmsg.org.uk/
www.cmcrossroads.com/cgi-bin/cmwiki/view/CM/CmTools/
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