

Worried About Choosing Your Next System?

Outlook Associates has extensive experience in systems planning, evaluation and selection, vendor contract negotiation and systems implementation. We have conducted comprehensive, in-depth evaluations and selections as well as more abbreviated processes, depending upon each client's specific needs, timelines and budgets. A structured, proven approach to your evaluation and selection process can help ensure you find a system that facilitates improved operational performance, provides better management data, reduces error rates, grows with evolving organizational needs and justifies your financial investment.

Outlook Associates developed the following evaluation and selection process, which is customized to each client's unique needs, to help achieve these critical goals and select the system that best meets business requirements.

1. Requirements Definition

The process begins with meetings with key management to clarify business objectives, growth plans, strategic partners, and working relationship guidelines. This establishes the general parameters for system needs and serves as a basis for the evaluation and selection process. These meetings are followed by a series of interviews and joint sessions with designated management, department heads and users in order to begin identifying system requirements.

Outlook Associates will provide a "baseline" Request for Proposal (RFP) that outlines Functional Requirements, Technical Requirements, Interface Requirements, Implementation Plan Requirements and Vendor Requirements. This tool will guide your selection team in thinking through all areas of needs and capabilities. It will be then be customized to meet your specific business requirements and form the basis for the requirements sections of your RFP document.

2. Vendor Pre-screening

Outlook Associates will assist in developing "critical evaluation factors" based on the defined requirements in order to pre-qualify vendors. Each of these factors will be assigned a relative importance weight resulting in a vendor "short list" to be included in the detailed RFP response and evaluation process.

3. RFP Distribution and Response

Outlook Associates will produce the RFP documents, instructions, CDs and other information for vendors and handle the distribution and coordination. We will respond to all vendor clarification questions and facilitate receipt of RFP responses without exposing you to premature and time-consuming vendor marketing calls and inquiries.

4. RFP Evaluation and Scoring

During the vendor response period, Outlook Associates will assist you in prioritizing and weighting detailed Functional, Technical, Interface, Implementation and Vendor Requirements Sections of the RFP, as well as individual RFP questions identified as crucial, to ensure that the critical areas of your business requirements are emphasized. We will score the vendor responses using your defined priorities and weighting to arrive at recommended semi-finalist vendors.

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5. Vendor Reference Checks

Outlook Associates will provide sample reference check questions and assist you in customizing them to fit your specific business and systems needs. Upon your approval of the semi-finalist vendors, we will assist in performing telephone and in-person reference checks with semi-finalist vendor clients.

6. On-Site Demonstrations

Outlook Associates will provide you with sample demonstration scenarios and assist you in customizing them to fit your specific business and systems challenges. These scenarios provide a structure for an “apples to apples” comparison of the semi-finalist systems. The vendors will each be invited to provide a comprehensive system demonstration and review using the scenarios provided, in order to show how the proposed system would support your business. Outlook Associates will coordinate the demonstrations, participate in the evaluation, assure vendors follow prescribed outlines and accurately represent capabilities, assist in tabulating evaluation results and document any gaps identified in the functionality of the systems.

7. Vendor’s Client Site Visit

Outlook Associates will assist you in determining which vendor client sites are most closely related to your business structure and operations. We will coordinate the arrangements for the site visits and attend, with your team, the on-site visits. These visits allow you to observe the systems in use and question system users on vendor and operational issues and concerns.

8. Selection of “Vendor of Choice”

Outlook Associates will assist you in evaluating and summarizing the following criteria to determine your vendor of choice:

- Vendor RFP response and score
- Notes from vendor reference checks
- Results, notes, scores and gap analysis from on-site vendor system demonstrations
- Notes from the site visit(s) to existing vendor clients
- Acquisition and implementation costs

9. Contract Negotiation Assistance

This typically begins with a critical, non-legal assessment of the vendor’s standard contract. Based on our previous negotiations with many of the health care vendors, we prepare written comments concerning key points which should be added, deleted or amended. We then work with you to develop a negotiating strategy designed to maximize the cost-effectiveness of the selected approach and to minimize the associated implementation and operational risks. Outlook Associates will advise you on areas where the vendor is flexible and areas where concessions may be more difficult to obtain. By understanding the vendor’s previous negotiating strategies, we can minimize the time required for you to complete negotiations.

After you have agreed on the negotiating strategy, we will participate in discussions on contract terms with the selected vendor. We will review the vendor’s subsequent contract drafts to ensure that they include the specific terms agreed to in our discussions. In addition to Outlook participation, we strongly recommend that the client use an attorney with expertise in information systems contracts to review and comment as the negotiations proceed.

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