Chapter 20

Package Selection

OVERVIEW

This chapter covers the typical procurement processes for selecting an IDCM solution and contains useful techniques for validating various solutions against requirements and negotiating a contract with a supplier.

Our objectives for this chapter are as follows:

- Discuss the requirements for developing a procurement (or contract) strategy and review the various procurement options that enterprises might use to select an IDCM solution.
- Discuss the requirement for an Evaluation Strategy as a methodology for reviewing proposals from suppliers, and provide an example Evaluation Plan template.
- Discuss the benefits of conducting a Benchmark Assessment as a method of helping to discern the most appropriate IDCM solution for the enterprise, and provide an example Benchmark Specification template.
- Consider the types of functional gaps that might be identified between requirements and offered solutions.
- Discuss the importance of reference site checks and the added benefits of reference site visits.
- Consider the types of issues that may need to be considered when determining final selection, and the submission of a Selection Report.
- Discuss the requirement for the development and execution of a comprehensive contract as a strategy to facilitate successful implementation.
PROCUREMENT (OR “CONTRACT”) STRATEGY

Background

Once an organization has developed its requirements specifications (Part 3) and set aside adequate funding to cover the likely costs of the installation, configuration, design, development, and implementation of an IDCM solution, then it needs to determine its procurement strategy. The procurement strategy is defined in a Procurement Plan, together with a definition of resource requirements, risk management, time frames, and project schedule.

Purpose

The Procurement Plan provides the methodology and approach by which an organization will secure an IDCM solution. Most enterprises will already have in place a policy and guidelines covering formal procurement processes for the acquisition of information systems, and these will provide a framework in which to develop a Procurement Plan for an IDCM solution.

Objectives

The objectives of a Procurement Plan are as follows:

- Reconfirm the scope of the requirement.
- Reconfirm budget estimates (indicating degrees of confidence).
- Define the procurement strategy, i.e., the methodology and approach for managing the procurement of an IDCM solution.
- Provide a plan that defines the deliverables from the procurement process.
- Define the privacy and confidentiality requirements that will apply during the commercial processes.
- Define or cite the requirements for transparency at all steps in the commercial processes.
- Identify risks associated with the procurement process, and provide mitigation strategies.
- Define the project resources for managing the commercial processes associated with the procurement.
- Define the time frames for the procurement process.
- Provide a project schedule for delivery of the procurement strategy.

Scope

The scope of the Procurement Plan should cover all aspects relating to the procurement of the IDCM solution from the development of the procurement strategy, until a contract is executed with the supplier of the system involved.
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