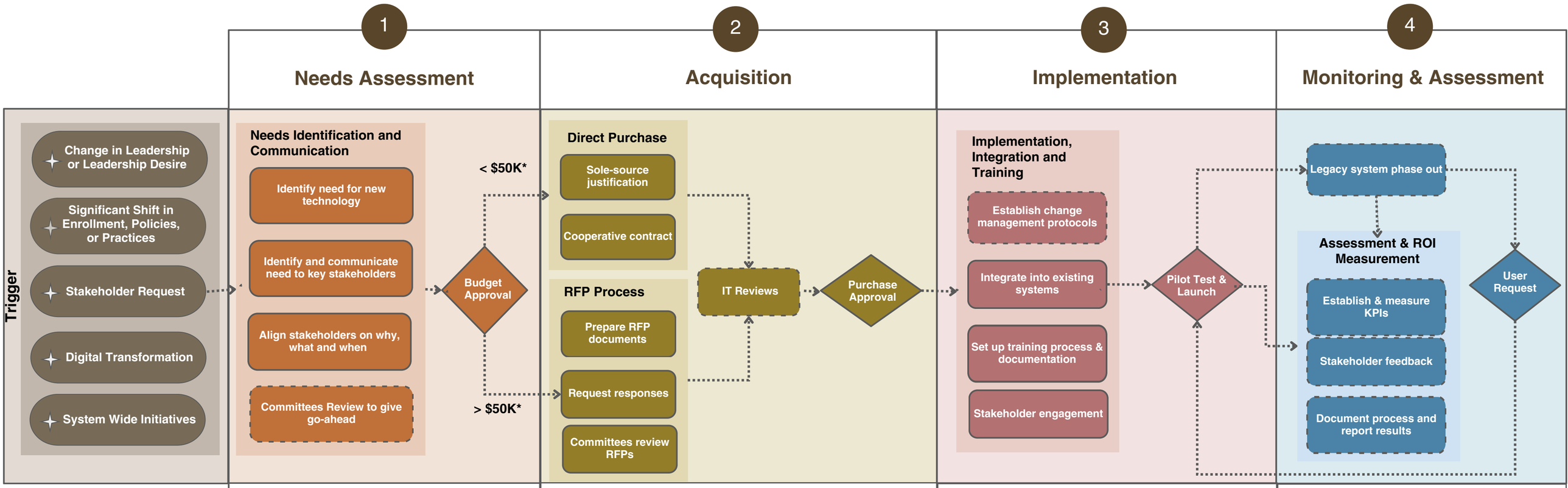
Birds-Eye View: Phases in the Technology Procurement Process



This phase is the first and most critical phase as it determines the success or failure of both collaboration and implementation.

At this stage, the driver/decision-maker has to lobby all influential and impacted parties on the need, intent, and desired outcome.

Depending on the position of the decision-maker, they may not always seek alignment, and may push through the purchase of their desired solution.

It is important for all the relevant stakeholders to be identified for change management, to ensure that all users are aware and accepting of the impact of the intended technology.

After identifying the need and proposing a software solution, committees are formed to gather essential information for procurement decisions. These committees vary depending on triggers and influential stakeholders, but it is crucial to include all relevant voices.

During this stage, consideration may be given to "sole-source justification" or "cooperative RFPs" to expedite procurement, particularly for products under a set purchase threshold (usually around $35K - $50K, depending on the institution).

Vendor selection is often influenced by marketing and prior relationships, as there is no comprehensive source for comparing advising products. Purchasers should prioritize their needs, and understand the integration requirements, training, and maintenance costs of each solution, as these are critical for the project's success.

Successful advising technology implementation typically involves integration into the existing student information ecosystem. During this phase, institutions with limited in-house technical knowledge and resources may enhance implementation efficiency by leveraging the specialized technical expertise and integration services bundled by the selected vendor as part of the software purchase.

Efficient integration depends on the early engagement of the institution's IT department prior to this phase. Pilots should be conducted to assess integration and functionality before full training and product launch.

Effective communication and change management are critical to align identified needs with the implemented solution.

Monitoring and assessing the newly implemented software's impact and performance with established Key Performance Indicators is crucial.

Employing effective change management and user adoption methodologies can reduce the risk of failure. However, in reality, institutions may not have the resources to establish these processes, until rising user needs trigger an evaluation or change of solution.

Conducting a brief user experience survey once the legacy system is phased out offers a valuable perspective for measuring success as well as a roadmap for implementing additional features.

KEY:

- Trigger to initiate procurement
- Current Process Milestone
- Ideal Process Milestone

*This figure varies from institution to institution

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