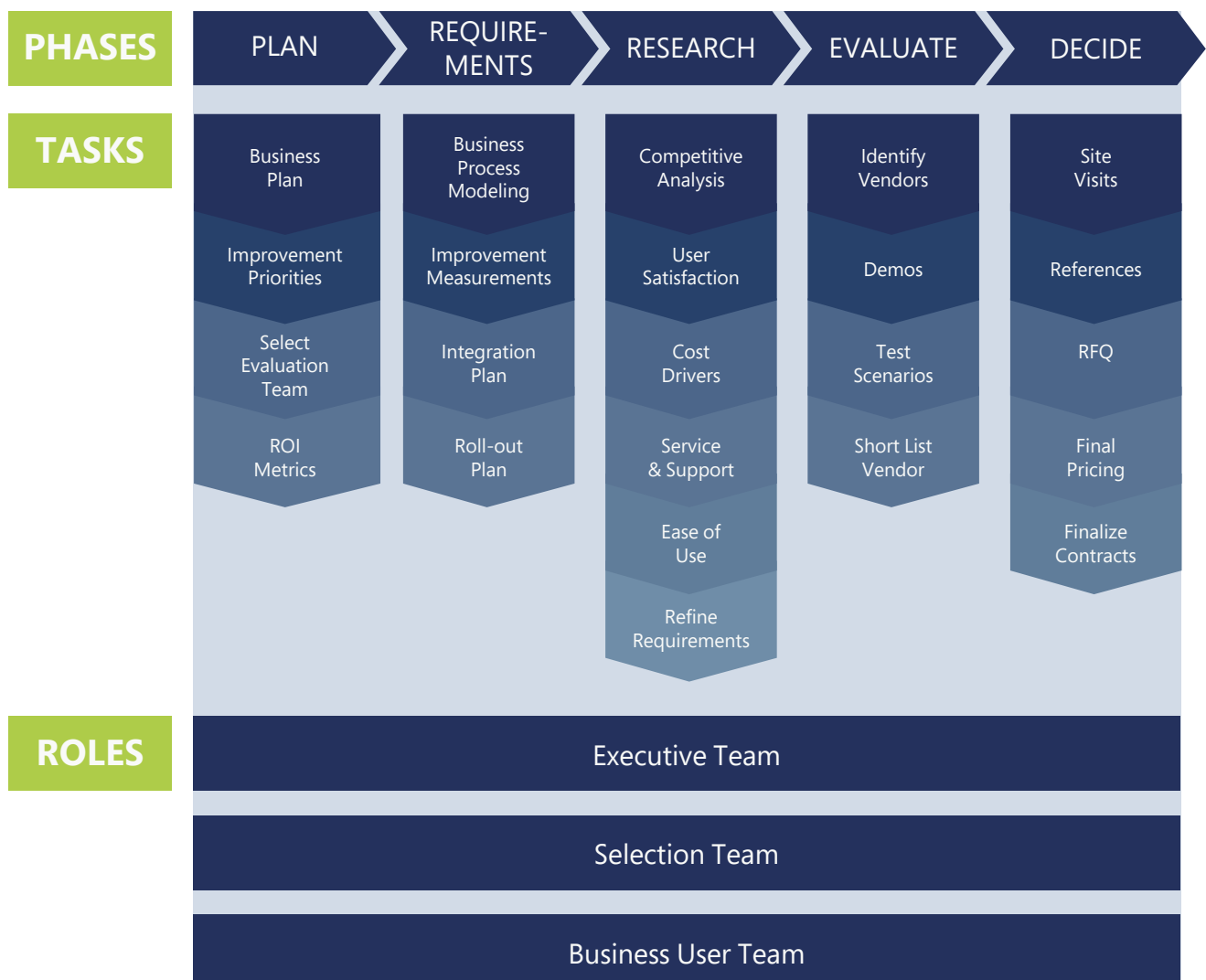# The 5-Step Services Automation Selection Process

This 5-step process guides you and your Services Organization (SO) through the Services Automation (SA) vendor selection process. Assure you keep all key stakeholders involved from the first phases of planning to implementation and roll-out. In order to identify an SA solution that meets your organization's needs now and in the future, you'll need to get everyone on board - particularly once it's rolled out. Your SA solution will only add value to your organization if it is adopted by your service teams that use it. Executive support will be the first step to getting your entire organization to utilize its new solution.

PHASES	PLAN	REQUIRE-MENTS	RESEARCH	EVALUATE	DECIDE
TASKS	Business Plan	Business Process Modeling	Competitive Analysis	Identify Vendors	Site Visits
	Improvement Priorities	Improvement Measurements	User Satisfaction	Demos	References
	Select Evaluation Team	Integration Plan	Cost Drivers	Test Scenarios	RFQ
	ROI Metrics	Roll-out Plan	Service & Support	Short List Vendor	Final Pricing
			Ease of Use		Finalize Contracts
			Refine Requirements		

ROLES	Executive Team
	Selection Team
	Business User Team

The Decision Making Checklist

Take the first step to finding the perfect solution for your organization using the following checklist:

Step 1: Business plan

Who is involved: Executive Team
• Identify why you are in the market for a new solution, including improvement initiatives and owners
• Determine a core Services Automation (SA) selection team, timelines, budget, and which executives will be involved.
• Document the benefits you are expecting to see and how they will be measured.

Step 2: Requirements

Who's involved: Core selection team, including IT, business owners, finance, and operations
• Establish requirements and determine which core processes are to be automated, including how businesses process and behavioral change are to be measured
• Include current state metrics, improvement targets, and what subject matter experts (SMEs) should be involved
• Determine budget and RIO metrics to justify purchase
• Determine how the system will be implemented (entire company, by department, etc)
• Determine which features will be deployed immediately and which will be deployed over time?
• Determine how groups transition to the new system and who will be the pioneers to support the transition?

Step 3: Research

Who's involved: Core selection team
• Analyze research reports, industry blogs, competitive analyses, user satisfaction ratings, industry benchmark reports, vendor websites, etc.
• Review demos, webinars, case studies, product guides, and specification documentation to get an idea of solution features
• Research deployment methods such as cloud, hosted, and on-premise
• Figure out how solutions are maintained and upgraded, and what the processes are for releases
• Look at ease of use across the user interface, standard reporting, and support for custom reports and analysis

Step 4: Evaluate

Who's involved: Core selection team, target user groups, implementation team
• Working with a shorter list of candidates, the evaluation process should include communication with each vendor to discuss how the vendor would address your SA specifications
• Schedule meetings for the vendor(s) to purpose how their solution will fulfill your needs and requirements
• Discussions should include target user groups to evaluate functionality, ease of use, business process change, and user acceptance, including:
     • How does this solution handle core business processes?
     • How much customization will be needed?
     • What services will be needed?
     • How long will it take to configure and deploy?
• Pay particular attention to the level of support the vendor will provide, including who will implement the system and provide ongoing support post-implementation
• Make sure you're as confident in the team as you are in the solution itself. Cost analysis must include implementation, data migration, integration, customization, training, purchase price, and ongoing maintenance
• Once you have narrowed your search, conduct in-person meetings with each vendor to discuss how the vendor will address your SA specifications

Step 5: Decide

Who's involved: Core team, legal team, finance
• Conduct site visits and reference checks with the preferred supplier
• Review contract terms
• Determine implementation process, timelines, and teams
• Performance guarantees
• Negotiate pricing

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