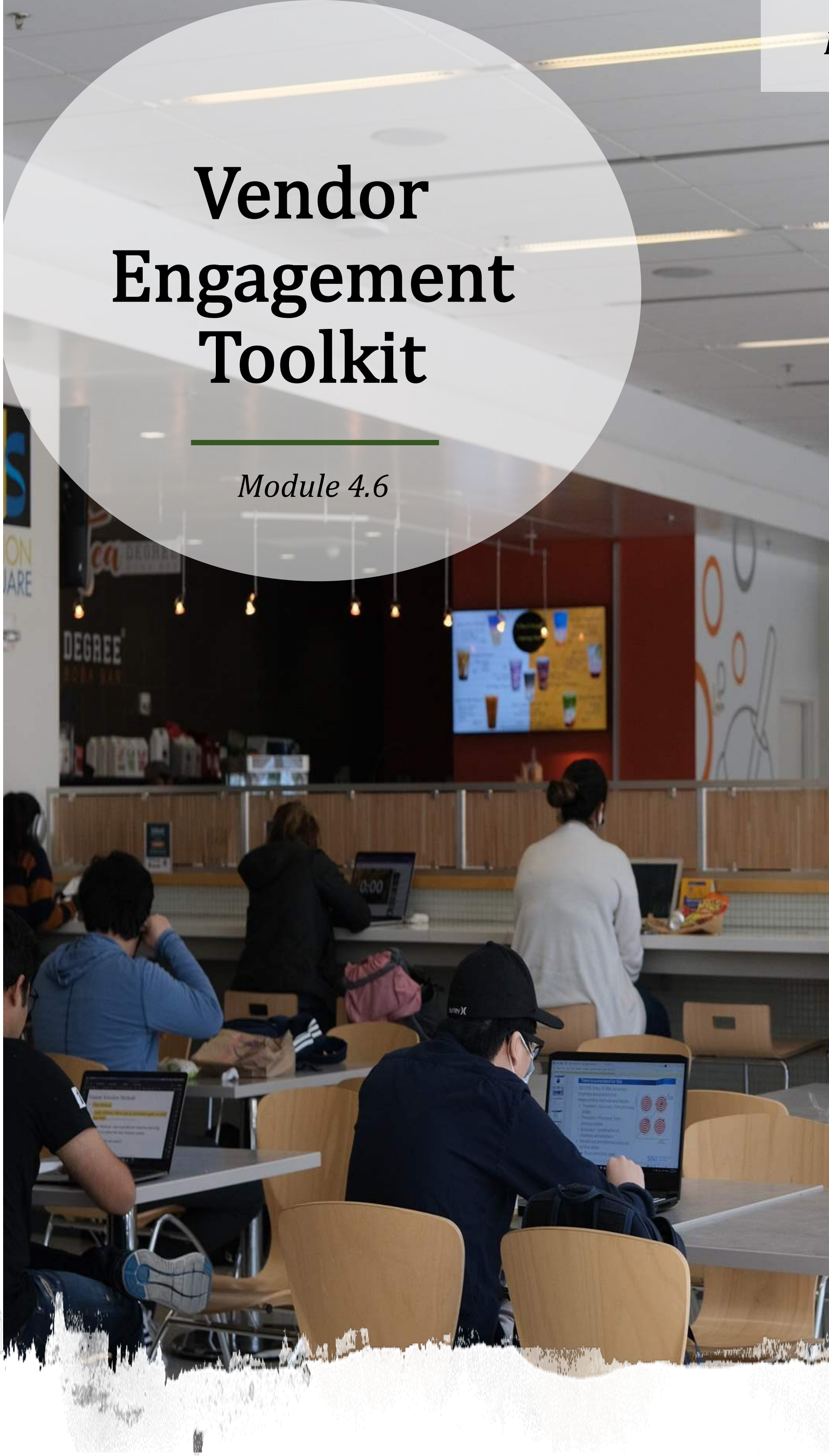


Vendor Engagement Toolkit

Module 4.6

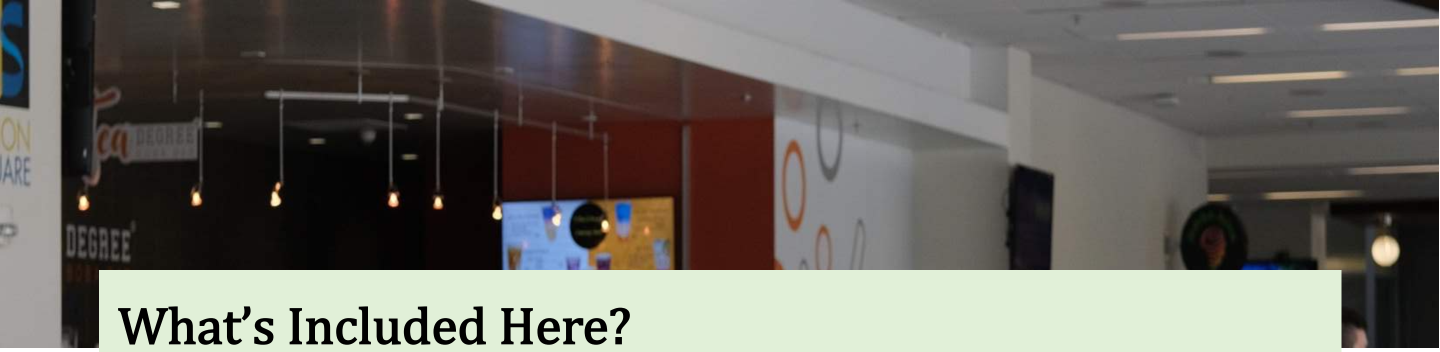
Contents

This resource will be most useful for institution leadership, technology procurement teams and/or steering committees engaged in student success technology strategy

COMPLETE COLLEGE AMERICA

The Ada Center

ADVISING SUCCESS NETWORK



What's Included Here?

Every procurement process is a bit different. The questions and due diligence involved in a case management system purchase, for example, will differ from those for an upgraded degree audit.

However, while products may vary, there are certain tried and true ways for productively engaging with the higher education vendor landscape.

The tools in this module touch on those tenets. They should help your team, and particularly those newer to engaging with ed-tech vendors, prepare for product demonstrations, compare and evaluate competing products, and ultimately, move forward with the procurement of a tool that feels well-aligned to your user needs and institutional goals.

We recommend using these tools organically and as-needed to augment your own discussions with and about vendors and products. Leverage them as guides, "cheat-sheets," and launchpads as you and your team navigate an ever-changing marketplace.

Note: Several of these tools have been leveraged and adapted from The Ada Center's 2021 publication, Advising Technology Procurement and Planning Playbook. This resource was made possible through generous contributions from the Bill and Melinda Gates Foundation and is freely available [here](#).

Anatomy of a Product Demonstration

Product demonstrations can be the most exciting part of this process. But it's important to still approach these presentations prepared with good, probing questions and a clear-eyed focus on your goals. Here's what you can expect from a typical product pitch, and what you should look for in each segment:

Company Introduction

Company background, market share, and product suite. It should give you a sense of the **company culture and areas of expertise.**

Vendor's Theory of Change

Vendors explain how they view the challenges in the field and set themselves up to explain how their tool will solve for these challenges. This is the company's way of setting up their product pitch; **the issues they pose create the foundation for the value proposition of their product.** It will align to the features they chose to develop and highlight in the demonstration. Consider whether their understanding of the root causes of key challenges aligns with your own.

Product Demonstration

This is your team's chance to **get the look and feel of a product** and to question which specific features are "live" (i.e., fully implemented in the field) versus still in the vision-state for the vendor.

Product Q&A

This conversation is helpful for probing on areas the vendor has glossed over, such as implementation approach, configuration capabilities, and data access and update strategy. Q&A can also be a useful opportunity to educate and energize team members that have been less engaged in the process, such as a senior leadership.

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Vendor Q&A Cheat Sheet

Not sure what to ask at the product demonstration? Wondering if your team covered all the bases in your last vendor meeting? This cheat sheet includes a sampling of the most important topics to cover with your potential new vendor and sample questions to leverage in your discussions as well as a link out to a more robust set of resources.

Critical Topics and Sample Questions

User Interface and Workflow

Does the product feel intuitive for different end-users?

Product Capabilities

Which capabilities in the demo are currently "live" at multiple colleges and which are still in development?

Implementation Approach

What will the specific implementation phases look like in terms of demands on our college staff?

Company Background and Culture

Can you give me a sense of how feedback from one of your customers helped guide the direction of the product?

Cost Structure

What ongoing fees or costs will come along with the product as we add users/scale? Do institutions typically need to invest in external consultants for any parts of the implementation or training process?

Key: Most Critical Stakeholders for Topic Area

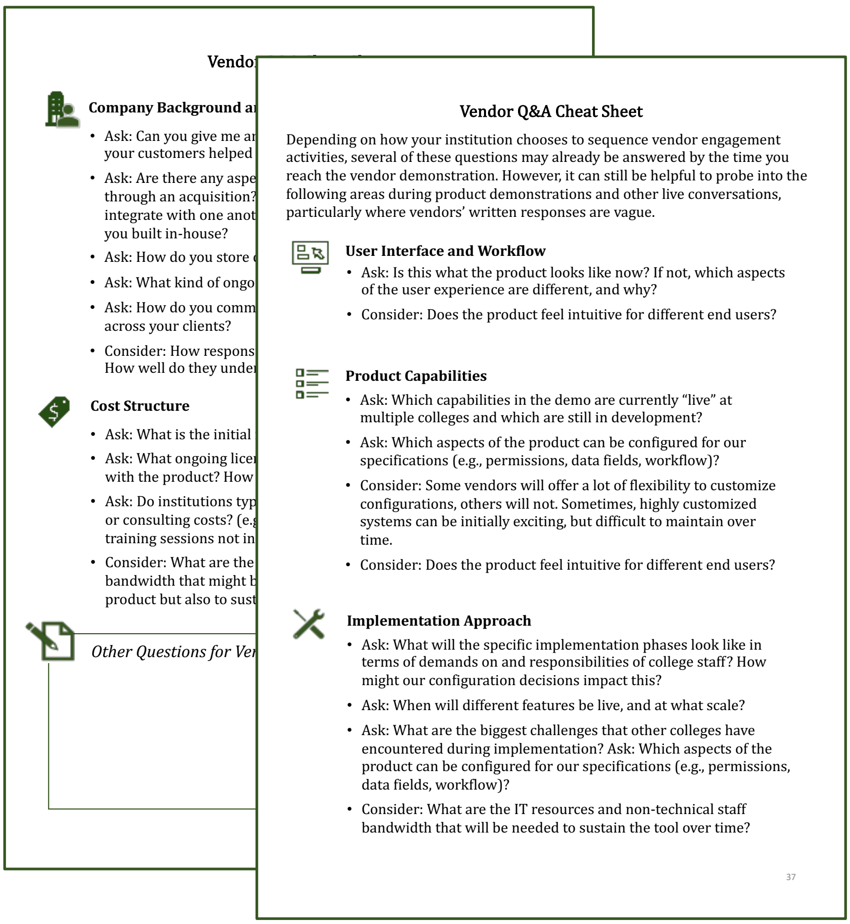
End-User

Strategy & Resourcing Leadership

IT and IR/Data

Vendor Q&A Cheat Sheet

Full Vendor Q&A Resource Guide



Vendo

Company Background a

- Ask: Can you give me ar your customers helped
- Ask: Are there any aspe through an acquisition? integrate with one anot you built in-house?
- Ask: How do you store
- Ask: What kind of ongo
- Ask: How do you comm across your clients?
- Consider: How respons How well do they unde

Cost Structure

- Ask: What is the initial
- Ask: What ongoing lice with the product? How
- Ask: Do institutions typ or consulting costs? (e. training sessions not in
- Consider: What are the bandwidth that might b product but also to sust

Other Questions for Ve

Vendor Q&A Cheat Sheet

Depending on how your institution chooses to sequence vendor engagement activities, several of these questions may already be answered by the time you reach the vendor demonstration. However, it can still be helpful to probe into the following areas during product demonstrations and other live conversations, particularly where vendors' written responses are vague.

User Interface and Workflow

- Ask: Is this what the product looks like now? If not, which aspects of the user experience are different, and why?
- Consider: Does the product feel intuitive for different end users?

Product Capabilities

- Ask: Which capabilities in the demo are currently "live" at multiple colleges and which are still in development?
- Ask: Which aspects of the product can be configured for our specifications (e.g., permissions, data fields, workflow)?
- Consider: Some vendors will offer a lot of flexibility to customize configurations, others will not. Sometimes, highly customized systems can be initially exciting, but difficult to maintain over time.
- Consider: Does the product feel intuitive for different end users?

Implementation Approach

- Ask: What will the specific implementation phases look like in terms of demands on and responsibilities of college staff? How might our configuration decisions impact this?
- Ask: When will different features be live, and at what scale?
- Ask: What are the biggest challenges that other colleges have encountered during implementation? Ask: Which aspects of the product can be configured for our specifications (e.g., permissions, data fields, workflow)?
- Consider: What are the IT resources and non-technical staff bandwidth that will be needed to sustain the tool over time?

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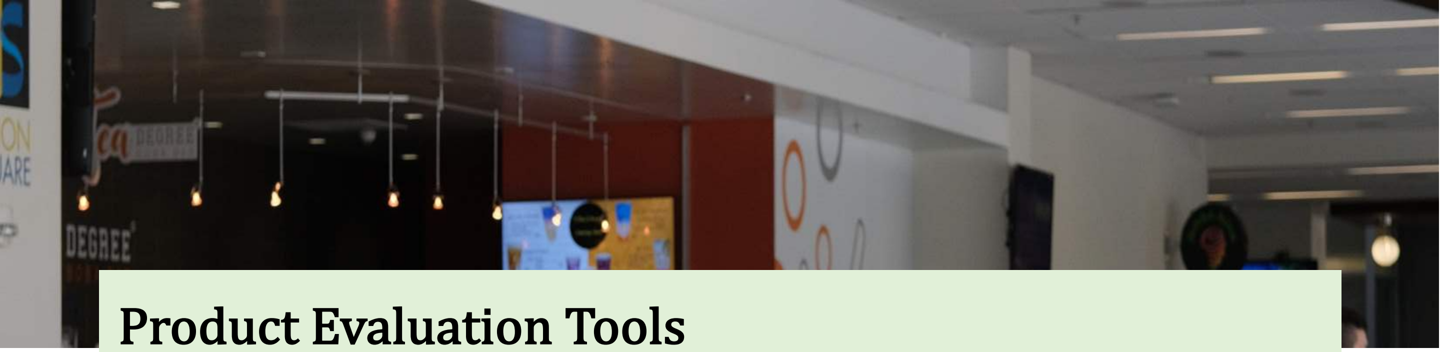
Resource Link Here (Click)

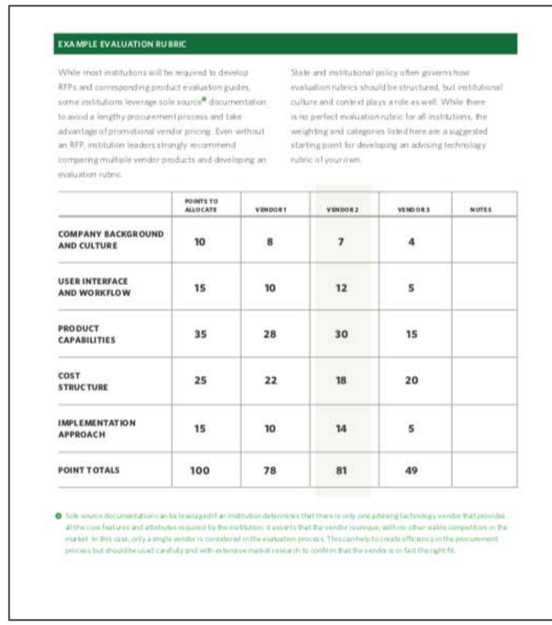


Product Evaluation Tools

Evaluation Rubric Illustration and Template

Exemplary procurement teams compare and contrast different vendors and products while maintaining a focus on institutional priorities. This tool includes a sample evaluation rubric (including key categories and sample weighting) that can be used as a reference point for institution or system leaders and teams.

Resource Link Here ([Click](#))



EXAMPLE EVALUATION RUBRIC

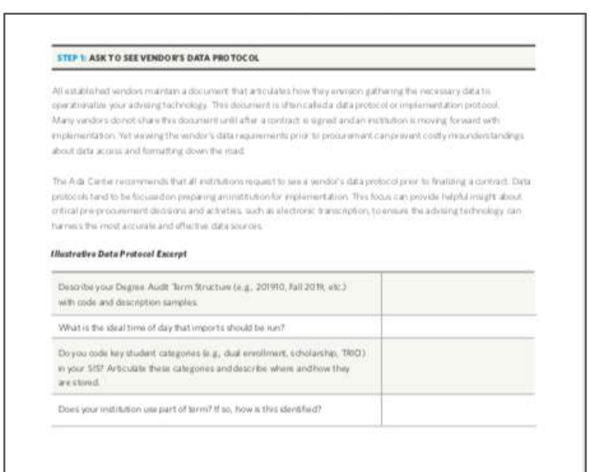
While most institutions will be required to develop RFPs and corresponding product evaluation guides, some institutions leverage sole source* documentation to avoid a lengthy procurement process and take advantage of promotional vendor pricing. Even without an RFP, institution leaders strongly recommend comparing multiple vendor products and developing an evaluation rubric.

State and institutional policy often governs how evaluation rubrics should be structured, but institutional culture and context plays a role as well. While there is no perfect evaluation rubric for all institutions, the weighting and categories listed here are a suggested starting point for developing an advising technology rubric of your own.

	POINTS TO ALLOCATE	VENDOR 1	VENDOR 2	VENDOR 3	NOTES
COMPANY BACKGROUND AND CULTURE	10	8	7	4	
USER INTERFACE AND WORKFLOW	15	10	12	5	
PRODUCT CAPABILITIES	35	28	30	15	
COST STRUCTURE	25	22	18	20	
IMPLEMENTATION APPROACH	15	10	14	5	
POINT TOTALS	100	78	81	49	

* Sole source documentation can be leveraged if an institution determines that there is only one advising technology vendor that provides all the core features and attributes required by the institution; it asserts that the vendor is unique, with no other viable competitors in the market. In this case, only a single vendor is considered in the evaluation process. This can help to create efficiency in the procurement process but should be used carefully and with extensive market research to confirm that the vendor is in fact the right fit.

Vendor Data Strategy Audit Protocol



STEP 1: ASK TO SEE VENDOR'S DATA PROTOCOL

All established vendors maintain a document that articulates how they envision gathering the necessary data to operationalize your advising technology. This document is often called a data protocol or implementation protocol. Many vendors do not share this document until after a contract is signed and an institution is moving forward with implementation. Yet viewing the vendor's data requirements prior to procurement can prevent costly misunderstandings about data access and formatting down the road.

The Ada Center recommends that all institutions request to see a vendor's data protocol prior to finalizing a contract. Data protocols tend to be focused on preparing an institution for implementation. This focus can provide helpful insight about critical pre-procurement decisions and activities, such as electronic transcription, to ensure the advising technology can harness the most accurate and effective data sources.

Illustrative Data Protocol Excerpt

Describe your Degree Audit Term Structure (e.g., 201910, Fall 2019, etc.) with code and description samples.	
What is the ideal time of day that imports should be run?	
Do you code key student categories (e.g., dual enrollment, scholarship, TRIO) in your SIS? Articulate these categories and describe where and how they are stored.	
Does your institution use part of term? If so, how is this identified?	

Before signing a contract, savvy procurement teams ask critical questions about a vendor's data access and configuration plans. Use this guide to explore whether your institution — and your preferred vendor — will be able to leverage key data critical to the success of the technology tool.

Resource Link Here ([Click](#))

Next Steps

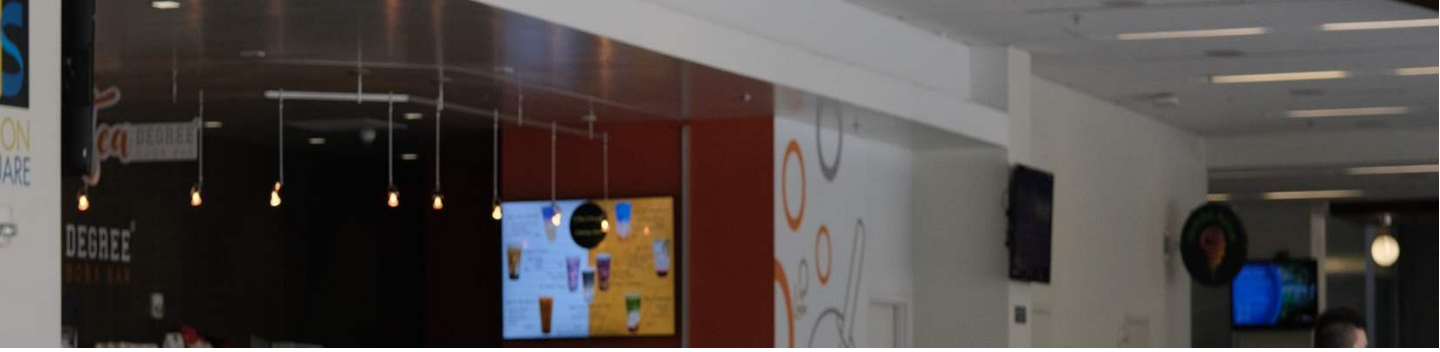
Congratulations! You have completed Module 4. Hopefully, you have been able to approach procurement with a greater sense of strategy and structure. Of course, procuring a new technology means that your team must now get ready for the next big step: Implementation. We will explore this next in Module 5.

- *Read* Module 4.1 How Should We Approach Buying New Technology?
  <1 hour
- *Watch and Complete* Module 4.2 Creating "User Stories" to Guide Procurement – Webinar
  3-4 hours
- *Review and Complete* Module 4.3 Check Your Basement: Avoiding Duplicative Technology
  2 hours
- *Watch and Complete* Module 4.4 How Can I Prioritize Competing Technology Needs? – Webinar
  < 1 hour
- *Read and Apply* Module 4.5 RFP 101: Getting Insight Without "Giving Away the Answers"
  3-4 hours
- *Read and Apply* Module 4.6 Vendor Engagement Toolkit
  1-2 hours

Module 4.6 Individual Reflection:

1) What was the most challenging part of the procurement process for you? Why?

2) What insights or lessons learned will you take with you to inform future technology procurement initiatives?



About This Series

This five-part instructional series on Student Success Technology is designed for minority serving institutions (MSIs) and their friends. Taken together, these instructional resources aim to provide practitioners with the tools to establish and maintain a technology ecosystem that effectively supports the institution's broader student success and equity goals. The exercises and resources within these modules are also widely applicable across the higher education field.

This resource was compiled with generous funding from the Bill & Melinda Gates Foundation and was authored by The Ada Center based on six years of insight from The Ada Center's work with hundreds of MSIs and access-focused institutions. The curriculum would not be possible without the thought partnership and support from Complete College America and the Advising Success Network.

For additional curriculum modules, please visit:
www.completecollege.org/navigating-student-success-technology

For questions about this resource, or to explore additional higher education technology research and tools, please visit www.theadacenter.org/resources.

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