

inspiring possibilities, informing choices...

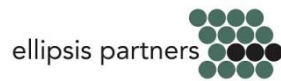
## Web Mavens Presentation

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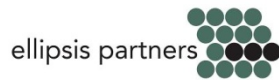
# Who We Are...



**Strategic consultants only to associations, nonprofits and municipal government organizations**



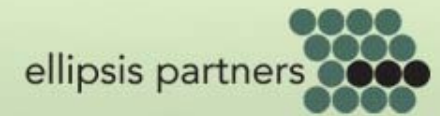
**Specialists in the strategic application of Internet technology to serve your mission and business**



**Objective, unbiased advisors for your technology initiatives and acquisitions**

- 8 years of business and over 120 association/nonprofit client engagements
- Based in the Baltimore-Washington Metro area, with clients extending from Canada, to New England to the Southwest.
- 6 consultants of varying specialty, all with nonprofit/association experience
- Member of ASAE Technology Council and regular faculty
- Specialists in product selections for AMS, CMS, CRM and eLearning

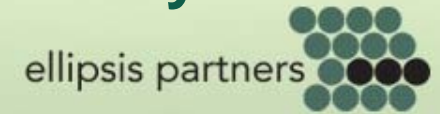
# Travel Buff



- Vendor Selections, analogous to trip planning
- Ellipsis Partners as the AAA of selections
- Our job is to get to you to where you want to be, with the least disruption, best price, and a good experience along the way. We:
  - Inform your choices
  - Point out important landmarks
  - Help you avoid landmines
  - Guide you through cost implications
  - Warn you about Flea Bag Motels

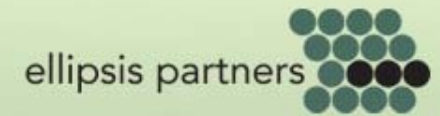
**This is YOUR Journey...**

# How ready are you to embark on this journey?



- Do you have a good handle on where you're coming from?
  - Realistic expectations. Some clients decide today that they want to go to China tomorrow.
  - What about a Visa, Passport, etc. (in other words...Do you have the prerequisite systems in place? What other resources are required?)
- Why and Where you're going.
  - Business case and operational preparedness
- How you're going to get there.
  - Who's the team?
  - Are the resources lined up?
- What you're going to do when you get there.
  - Organizational goals

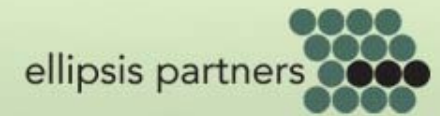
# Your Business Case



In a selection project, these questions are addressed in a business case

- **Where are you now?**
  - Understand your current landscape
- **Why are you going?**
  - Customer, market and staff needs.
- **Where are you going?**
  - Which processes are you changing.
- **How are you going to get there?**
  - Build support – political and financial.

# Packing Tips



## Where are you now?

- User experience surveys
- Business Intelligence (stats, analytical reporting)

## Why and Where are you going?

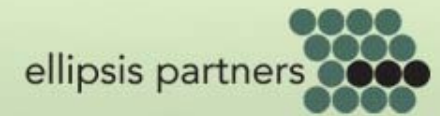
- Focus groups, interviews, strategy surveys, usability testing.

## How are you going to get there?

- Do you have the political capital?
- Do you have the financial resources?
- Do you have sufficient staff resources to manage new tools once you have them?

**HINT:** If you don't have sufficient staff to support a selection process either through a consultant or directly, you do not have enough staff support to implement a new product.

# Complete Requirements

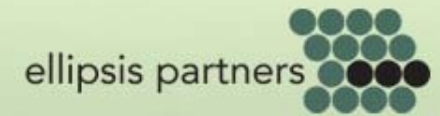


- Align Customer Feedback with Staff Needs
- Separate PROCESS from GOAL.

*Staff often get wrapped around being able to do things exactly as they do them now. Often based on current technology.*

- Include strategic goals of organization
- Be sure to prioritize what you NEED vs. what you WANT

# CMS Selection Considerations



- Dig beyond administrators
- Admin-Editors – Authors – Influencers
- External contributors
- Document work flow
- Again be HONEST about your organizational culture. How broadly will you REALLY distribute content pu?

# The Big Questions



- If you had \$1 to spend, where would you spend it?
- What is the greatest source of pain?
- What works well for you now?
- Where do you find yourself going outside the “tools” to do things manually?
- Where do you want to be in five years?

## Emphasize Process over Project



- Everyone packs differently...it's a question of what works for you. Your org may require other steps.
- Consistency is the key.
- If you do it the same way every time, you are more likely to get comparable results.
- Be Directive...if you don't say what you want you might get everything but that.
- Be Open...allow yourself to learn from the vendors.

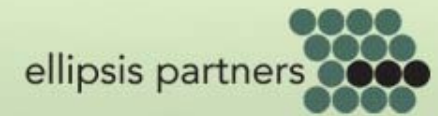
# Ellipsis Partners Process



- Requirements Gathering
- RFP and Timeline Development
  - Build Potential Vendor List
  - Send RFP
- Intentions to Bid
  - Field Questions
- Review Proposals
- Select Semi-Finalists
  - Invite Semi Finalists in for Demonstrations
- Narrow to Finalists
  - Reference Checks
  - Request Best and Final Proposals and Pricing
- Decision

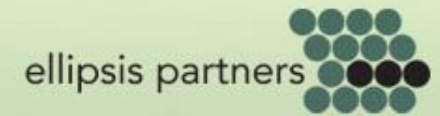


# Organizational Preparedness



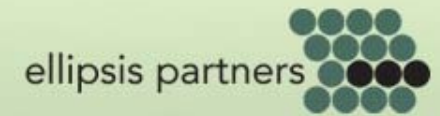
- Identify an internal Project Manager at project initiation
- Create Staff Champions
- Understanding funding construct
  - Source of funds
  - Appetite for initial v long-term investment
  - Vulnerability
- Keep Management Informed
- Anticipate and Mitigate Cultural Resistance
  - Frustrated users
  - Disappointed customers
  - Project Delay or Failure

# What are some common “Red Flags?”



- Big appetite, small wallet
- Event-driven “go live”
- Financial resources primarily through insecure funds (grants, etc.)
- Internal Sabotage (real choice or just going through the motions?)

# Take Lots of Pictures



Send a postcard or two...

- Document your process
- Create benchmarks and reporting intervals
- Promote the project internally both up and down the ladder
- Identify metrics for establishing ROI