

SELECTION, CONTRACT AND IMPLEMENTATION TIPS

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Selection Tips

- Define system requirements / selection criteria
- Develop RFI and/or RFP
- Use scoring tool on RFP results
 - ▣ Compare Apples to Apples
- Make reference calls – document the results
- Attend site visits – ask questions and document answers
- Request scripted demonstrations – score the results
- Begin contract negotiations with more than one vendor

Contract Tips

- Consider the contract a tool to manage the project and the vendor
- Understand EXACTLY what you are purchasing
- Tie vendor deliverables / major events to payment terms
 - ▣ 35% at contract signing
 - ▣ 20% upon software install
 - ▣ 45% upon acceptance after first productive use
- Define acceptance criteria
- Define first productive use
- List individual item cost

Contract Tips Continued:

- Detail vendor professional services
- Define interfaces in detail
- Include Change Management process
- Warranty start date match first productive use
- Confirm vendor support hours match your need
- Quantify any mention of “reasonable”
- Indicate vendor is bound by their RFP response
- Include a mutual “out” clause
 - ▣ 60 days written notice without cause

Implementation Tips

- Pay attention to vendor recommended staffing levels
- Assign someone the role of Project Manager – preferably someone with PM experience
- Create Project Steering Committee
- Do not underestimate the time it will take to build and implement the system
- Do not assume your staff can do this in their “spare time”
- You WILL need to staff up

Implementation Tips Continued:

- Be prepared to back fill project team positions
- Don't accept generic vendor project plan as "your plan"
- Insist the vendor provide a plan/schedule designed for your scope and your resources
- Break project into manageable phases
- Request system training prior to creation of conversion files
- Engage 3rd party interface resources early on
- Engage Physician partners early on

Implementation Tips Continued:

- Use multi-disciplinary teams for system design – empower them!
- Document current workflow
- Create and document future workflow – address gaps
- Create P&P committee structure
- Develop form transition process
- Involve staff in hardware selection
- You will need a computer training space
- Don't let the vendor rush you – they don't always have your best interest at heart AND you are the customer!



Questions??