



Part II
Analyzing RFP Results and
Selecting a Vendor



Step 1 - Creating the Short List

Qualifying the Vendor

- Length of Time in Business
 - Number of copies sold
 - Number of users
- Customers
 - Customer profiles
 - Number of systems sold
 - Number installed



Qualifying the Vendor

- Development & Technical Support
 - Number of employees exclusively associated with the EMR
 - Average experience
 - Average tenure in
 - Support, R&D, QA/QC, Help Desk
- Interfaces
 - HL7, DICOM, Others
 - Standards Organizations



Qualifying the Vendor

- Financials

- Audited financial statements for last 3 years
- Banking reference

- Mergers

- Are they taking care of their users following a merger?

Step 2 - Develop a Scorecard and Rate the Vendors

- Develop a scorecard with which to rate the vendors
- Suggested scorecard
 - Functional area
 - Vendors 1 through Last (short list)
 - Functional area score – simple method = (1 through 5) 1 = low, 5=high

Rating the Vendors (short list)

Sample scorecard

Functional Area	Vendors			Comments
	1	2	3	
The system shall have the capability to record and maintain patient demographic data and to capture all maintenance history to demographic data				
The system has the capability to identify and merge patient identities and records into a single patient record				
** Note ** The total should include both, a total and the average total.				



The Evaluation Team

- The “team”
- Department heads from affected departments
- IT



Step 3 – Schedule Onsite Product Demos

- Reference calls using the client lists provided by the vendors
- Develop demo ‘scenarios’ to control the demo
- Deliver the ‘scenarios’ to the vendors and schedule the demos
 - Tell the vendor what is the expected duration and that it must not be exceeded
 - If possible, schedule all demos to take place within a short period - one to two days



Prior to “demo” day

- Meet with the evaluators and provide clear instructions on how to conduct and score the evaluation
- Emphasize that attendance by the evaluation team is mandatory
- On “Demo Day”
 - Collect completed scorecards at the end of the demo



Step 4 – Review Results

- Schedule a meeting to review the results shortly after the last demo
 - Should be participatory – all comments and observations are welcome
- Keep senior management abreast of results



Step 5 – Schedule Visits

- Assemble a ‘visit team’ – keep it short
- Visit sites that include all demo vendors (short list) or just the top two
- Objective is to see the system working – ask questions, observe, take notes
- Meet and discuss what you saw and heard as soon as possible



Step 6 – Select Finalists

- Meet with the evaluators and the team to discuss:
 - Outcomes of the demos and visits
 - Ensure that everyone agrees with what is on the scorecards –resolve all differences
 - Consensus would be nice, but sometimes someone must cast the deciding vote



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Part III
Contracts