DEMO TRACKER

Delivering technology that works for your association.

Helpful Tips for Reviewing Demos

Welcome to the Demo Tracker!

As you embark on your journey to replace your AMS/CRM system, you are likely to do a lot of window shopping – viewing the basic demos of a number of vendors to see which appeal to you. Keeping all the solutions, features and your thoughts organized can be tough. We created this guide so that you can easily track the solutions you have seen and stay organized. Good luck with your search and please let us know if we can help!

STEP 1

When considering solutions, it is important to compare apples to apples and to get beyond the fancy bells and whistles that may feature prominently in demonstrations. Afterall, most of your time in an AMS/CRM is spent doing more routine tasks.

Select 5 things you know are important functions for your organization and write them in the features section of the rating sheet.

Not sure what to pick? Here are some common suggestions:

CRM – Adding a Record
CRM – Adding Individual to an Org
CRM – Managing Duplicates
CRM – Recording an Interaction
Finance – Processing a Payment
Finance – Selling Membership
Committee – Adding a Member
Reports – All Active Members
Events – Setting up a Webinar
Reports – Event Attendee List

| | 1 Poor | 2 Fair | 3 Adequate | 4 Good | 5 Excellent |

Feature	Score
Feature #1	
Feature #2	
Feature #3	
Feature #4	
Feature #5	

As you watch today's demos, rate the solution as vendors demo your selected features. If they miss a feature, ask the vendor how they would handle it. The vendors will be happy to help you so don't be shy!

STEP 2

Complete a unique sheet for each demo you see as soon as the demo is complete.
This will allow you keep all of the features and vendors you see from running together.

STEP 3

Use these ratings and notes to determine who would be a good fit for your organization. We recommend inviting no more than 6 vendors to participate in an RFP process. This provides enough variety in the selection process which ensures that you can deep dive into their offerings.

If you have multiple staff members completing evaluations, aggregate them together for an even better view of potential solutions.
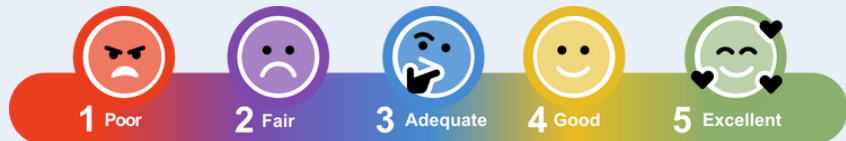
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Software Mage Demo Tracker

Vendor Name/Solution	Date

Rate the Vendor's Demonstration of the Functions Shown in Demo

Rate the vendor's demonstration of each feature they show during their presentation.

1 Poor **2** Fair **3** Adequate **4** Good **5** Excellent

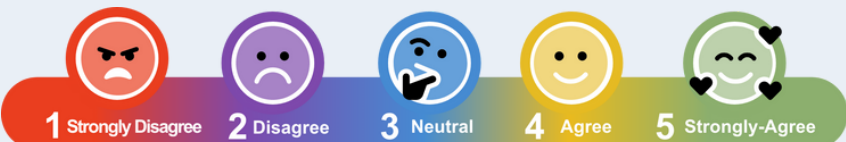| Feature	Score
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Notes — Record your observations about the features and functions shown during the demo here.

Vendor Impressions

Rate each of the following statements according to the scale below:

1 Strongly Disagree **2** Disagree **3** Neutral **4** Agree **5** Strongly-Agree

Area	Score
The vendor's presentation was appropriate for me.	
The solution presented would be able to handle our needs.	
This solution seemed intuitive and easy to use.	
The solution seems appropriate for our size association.	
We should include this vendor in our RFP shortlist.	

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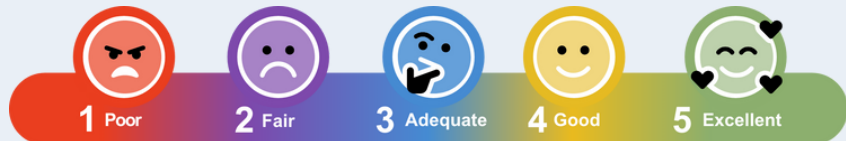
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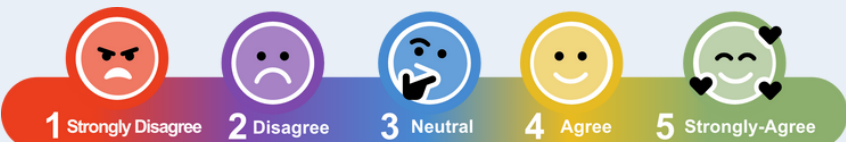| Feature		Score
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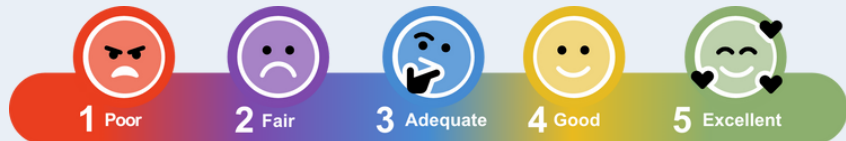**Notes** Record your observations about the vendor and their presentation here.

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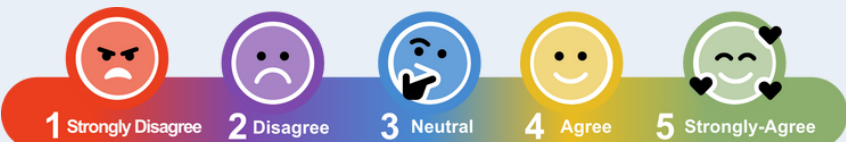**Notes** — Record your observations about the features and functions shown during the demo here.

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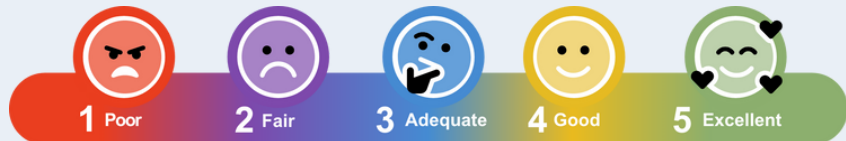**Notes** — Record your observations about the vendor and their presentation here.

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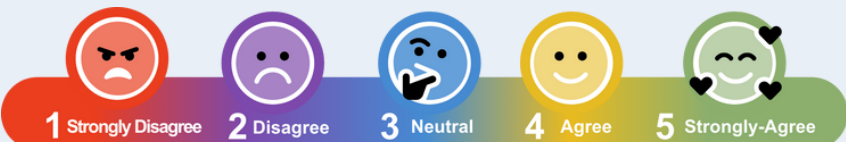| Feature	Score
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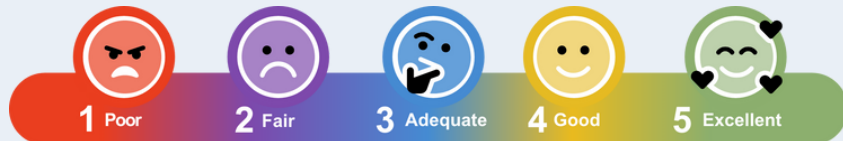**Notes** Record your observations about the vendor and their presentation here.

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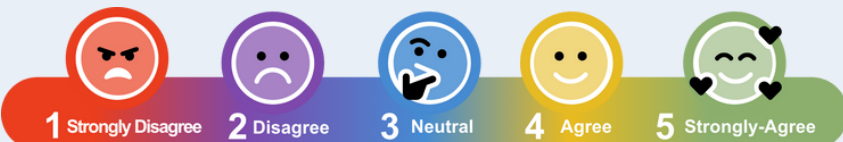| Feature	Score
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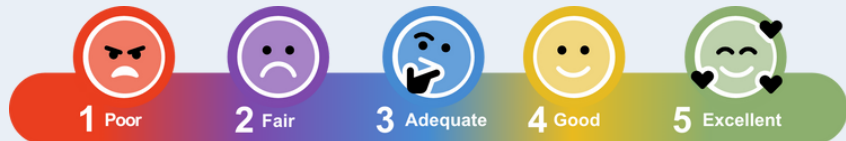**Notes** Record your observations about the vendor and their presentation here.

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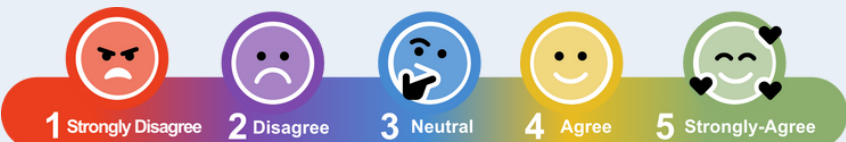| Feature		Score
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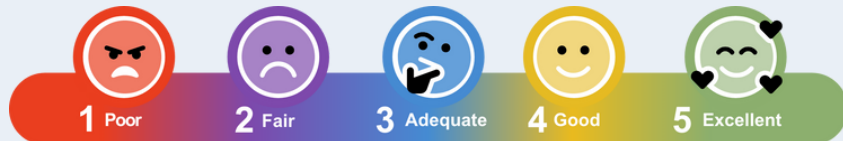**Notes** Record your observations about the vendor and their presentation here.

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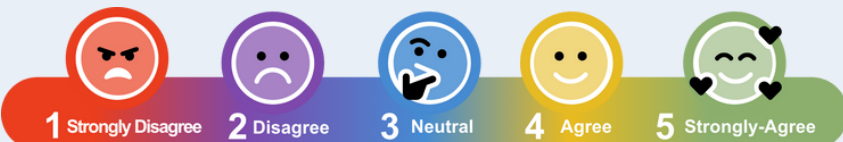| Feature	Score
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Technology projects have a reputation for being difficult to manage. If not done properly, there is a significant chance of poor outcomes that do not meet the needs and expectations of the organization, especially when the project is implementing or replacing a critical business system. This is not surprising in associations which tend to be mission focused and not have access to deep technology resources.

501Works takes a very process driven approach to these projects that accounts for both the technical and human side of these initiatives to achieve better outcomes. Our process starts with a deep set of planning exercises conducted during the selection process so we can examine the "problem" from different perspectives.

Overall, we break the big task of finding and implementing a new system into smaller, more manageable pieces. These steps are depicted in the graphic and are tailored to each engagement since these projects are never "one size fits all."
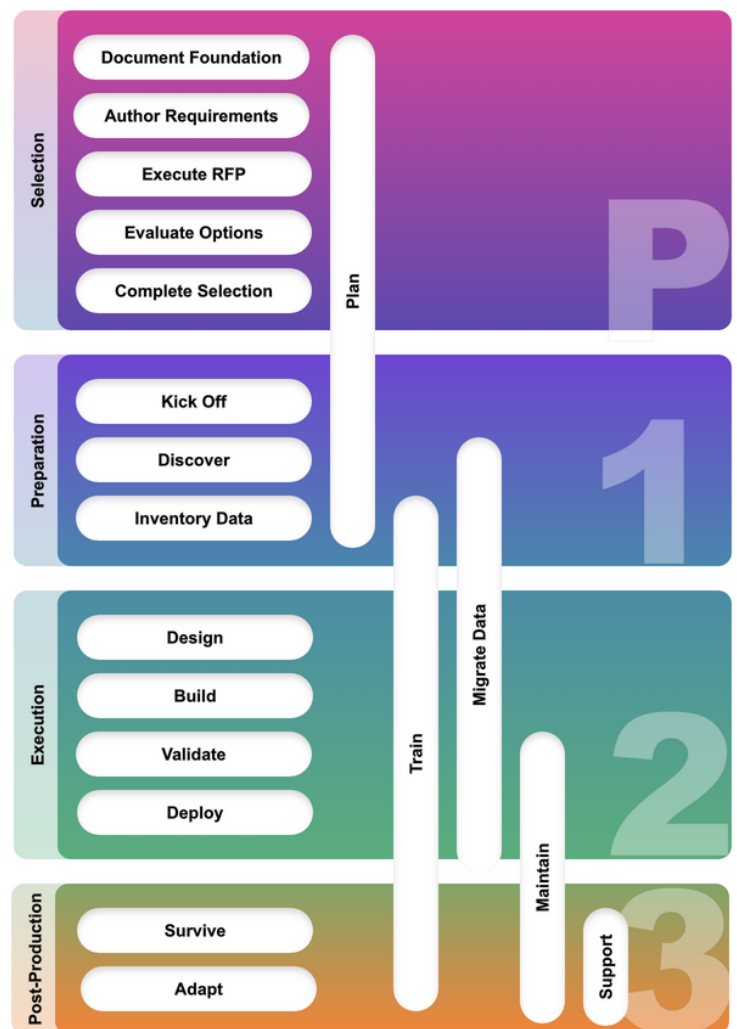
While this looks daunting, by taking it in phases and using a systematic approach to each step, the progress towards the end goal can be measured and there are myriad opportunities along the path to take stock and ensure that the project remains on track.

Contact us today and see how 501Works can help you get the most out of your technology projects and investments including:

- CIO level planning services to help set your strategic direction.
- Guided selection services to find the best fit technology for your needs.
- Implementation services to ensure projects are executed successfully.
- Design services to showcase your organization in the best light.

Our mission is simple –
Deliver technology that works for your association.

"If I had an hour to solve a problem, I'd spend 55 minutes thinking about the problem and 5 minutes thinking about solutions."

- Albert Einstein

Selection (P)
- Document Foundation
- Author Requirements
- Execute RFP
- Evaluate Options
- Complete Selection

Plan

Preparation (1)
- Kick Off
- Discover
- Inventory Data

Execution (2)
- Design
- Build
- Validate
- Deploy

Train | Migrate Data

Post-Production (3)
- Survive
- Adapt

Maintain | Support

Are you considering a consultant to help you with your project? If so, we would love to talk.

- Using a consultant can help add resources to your staff to offset the burden of a major project.
- Provide guidance to help you avoid common project mistakes.
- Craft requirements and RFP documents that truly define your organization and will get vendor's attention.
- Identify vendors that will be a good size, cost and resource fit for your organization.

Just like this Demo Tracker we have built a number of tools and processes that will take your project to the next level and make you shine!

Our mission is simple –
Deliver technology that works for your association.

We are here to help! Call or email us for a 30 minute free consulting session.

📞 **703-459-9779**

✉️ **info@501works.com**

🗂 **501works.com**

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