

# Find the Perfect ILS:

How to Evaluate  
Your Options



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## How to Evaluate Your Options

You find yourself dreading the next phone call or meeting with your library management system vendor...or perhaps s/he has canceled the meeting, in which case you have to send a number of emails and hope that your questions get answered, and your issues get resolved. Something's wrong here... everything used to be so great, but now it's not. **Was it something you said?**

You need to take a hard look at what's not working; in fact, you need to continually monitor your commercial partnerships, just as you need to regularly review your departmental budget, the performance of your staff, and the satisfaction of your end users. First and foremost, you purchase library and knowledge management applications from a software provider in order to support a business strategy and to fill functional requirements. Keep an eye on how that's working out—if either of those fundamentals changes, **can your vendor keep up?**

The first step in assessing your relationship with a vendor is to identify the factors that brought you together in the first place. It's likely that you have both common goals and separate objectives. A mutual awareness and attention to these is the key to long lasting, beneficial commercial partnerships... conversely, if your vendor is unaware and inattentive over time, serious reasons to make a switch will surface and **you may need to make a tough decision.**

We all know that librarianship and knowledge management aren't all about **technology**, but let's face it – your software platform is the delivery vehicle for your information and content. If the wheels come off that wagon, problems will ensue. Honesty and open **communication** are fundamental in any good partnership, so if your vendor isn't **delivering on commitments** and isn't listening, alarm bells should go off. Finally, your **core values** should be in alignment. They're the glue when things get a bit shaky.





# 10 reasons for leaving your ILS vendor:

## Technology

Various technology or functionality related issues may wave as red flags over time:

- The vendor is lagging behind advancements in technology, such as support for mobile users, multi-browser compatibility, or integration with third party applications common in your industry.
- Other providers to your sector are offering industry specific enhancements to their software that you see as extremely useful, but your current vendor has no plans to compete.
- Help Desk support regularly fails to meet your needs, leaving you with ongoing technical issues and IT staff who are frustrated with your choice of platform.

## Lack of Commitment

The below scenarios usually reflect a change in the vendor's business strategy rather than your account manager's failing, but they can be real relationship killers:

- You no longer have access to new products or functionality that are developed during your contract term and are required to add new services at new user pricing, jeopardizing

the administrative and operational efficiencies you were counting on for the life of the agreement.

- Once upon a time, your input on new product development or enhancements was taken seriously, but now you're told that your suggestions will only be taken forward if other clients show an interest in them—or even worse, you are told that nobody else shares your requirements and that you are out of line for even having them.
- Rather than helping you position yourself as a strong strategist or operational guru within your organization, your vendor is focused on engaging with your executive team purely in search of upsell opportunities, possibly marginalizing you in the process.

## Values

You're a busy person, and vendor relationships are just one element of your role. Your account manager should be aware of that and give some attention to how your time can best be leveraged. If you experience the below issues, there may well be a values conflict. No matter the behind-the-scenes causes, if they persist, you should consider moving on.

- All vendor staff should keep their appointments with you, do their best to meet your deadlines and honor any constraints you have shared with them.
- Account managers should be prepared – they should have done their homework on your industry, your organization and you.
- If you have a new account manager every time you turn around, that reflects poorly on the vendor's culture and client service orientation.
- If you have the occasional special request, e.g. for marketing materials to support an internal presentation, or a highly focused training session for senior staff, and the vendor doesn't see it as a way to cement the relationship, you'll know where you stand: pretty low on the priority list.

If you come to the realization that a commercial partnership is no longer fruitful, terminate it in the most professional manner possible, preserving your integrity and protecting your own reputation, as well as that of the other party. During the course of your career, you are very likely to interact with the same individuals involved, but under different and hopefully more positive circumstances.



# And here's (exactly) how to move on...

So, you've made the decision to switch vendors. We believe there are some critical steps in the process that will result in a good decision and a successful new relationship. The following is a suggested framework and checklist.

## **Good Times: Selecting an ILS**

Once you and your manager have made the decision to invest in a library automation system, the fun begins. Through the years and over the course of many client relationships, we've seen several guiding principles emerge, which if followed, will ensure a successful implementation and a fruitful commercial partnership. Let's take a look at the first stages of the pre-selection process – assuming that you have already done some homework and have a few vendors in mind.

### **Get your priorities straight**

First and foremost, you are buying library and knowledge management applications from a software provider in order to support a business strategy (the benefits) and to fill important functional requirements (the features). It is critical that at every step of the way, you test each decision against these two sets of requirements.

### **Disclose your deal breaker(s)**

There is always at least one requirement – either a benefit or a feature – that is an absolute must-have as part of your new system. It might be a fully multilingual interface, it might be faceted search, it might be very specific reports generation capability, or the ability to extract data from an existing application that your manager just loves and won't surrender. The thing is, you know what your deal breakers are, and it's critical that you disclose them to potential vendors up front. If your requirements disqualify them, you can part ways without having wasted their time or yours. A vendor who knows what is of the greatest importance to you, who can provide it and who makes sure that they do, is a vendor you want to work with. Don't make them guess how to help you be successful. You aren't giving away your power by being transparent; you're saving time and letting them know exactly who they're dealing with.





### Plan your software selection process

- Schedule adequate time for the due diligence
- Include key decision makers, e.g. management, IT staff and library staff

### Lay the groundwork

- Make sure you have management support for the funding and staff time you need
- Confirm real requirements versus nice-to-have
- Consider staging your requirements based on what's vital to startup, versus longer term needs

### Assess your existing resources

- What software do you already use?
- Is your data in a format that can be easily converted?
- What internal IT resources do you have? Are in-house programmers available to you and will they make you a priority?

### Be open to adjusting your workflow and protocols


- Automation imposes order, and your current processes might include tasks you don't need or want once you have suitable software

The above are important *internal* factors; next we'll share some suggestions that focus on the external environment, and by the way:

### If you're thinking of building it yourself...beware!

- Organizations document many failed attempts to build applications themselves. For example, one company spent over 100-person months developing an application before giving up and buying a commercial ILS; once they did, they were up and running within weeks
- Often, solutions built in house no longer meet requirements by the time they're ready to launch
- Internal cost of building an application can be high, and often the solutions aren't fully documented
- There is often no support for enhancements or bug fixes, and given the time to results, the original builder has often left the company by the launch date





### Carefully evaluate commercial versus open source products

- Purchase price isn't the same as total cost of ownership (TCO), which includes support and customization costs
- Open source products have their own inherent costs, often difficult to itemize, anticipate, or estimate
- Choose between commercial and open source products based on your goals, needs, and your available resources – don't forget that you do need staff to implement and maintain open source platforms

### Consider hosted versus licensed software

- Vendor hosted software ensures that it will be maintained and upgraded – it's their responsibility, not yours
- You'll always have the latest enhancements and bug fixes
- Hosted software has minimal impact on your IT infrastructure and staff resources, lowering the TCO and removing complexity

### Ask potential vendors what product support and enhancements you'll receive

- What support, upgrades and bug fixes are included?
- What happens to support if you customize?
- What does the quality of support tell you about the supplier's attitude toward its customers?

### Develop a realistic implementation timeline and share it

If there is an event-based launch date, such as a partner meeting, internal conference etc., make sure that your vendors know about it and can confirm that meeting the date is realistic. When you think about timing, remember to include testing (and time for users to beta test) so that you have worked out any issues prior to launch, and finally, adjust for any events that will impact the schedule, such as holidays, staff PTO etc. Share your preferred kick off date and drop-dead launch date with your potential vendors; if they cannot meet those dates, it should be a non-starter.



## Making the final decision

You will have learned a lot during the pre-selection process. It's important to look, one more time, at your goals and requirements, and to make sure that the products on your short list meet them. As insurance, you should get demos of your favorite two products again, and don't be shy! Vendors like you to ask questions and fully evaluate their offerings. And if the vendors don't like to help you, do you really want to work with them?

You'll need to contact a few references given you to by the vendor, and in addition to that, you should get informal input by checking listservs and the Internet to see what has been said about the supplier *over time*.

Go over the pricing and contract terms with a fine-toothed comb to make sure there are no surprises after the contract is signed. Make sure to observe your organization's policy on contract review—involve someone from Procurement or Legal if required. Two sets of eyes are always better than one. Then, make your decision: *confidently choose the product that is right for your organization, regardless of whether it's the marketplace favorite.*

## Relationship Management

As you move forward with implementation, you'll want to keep your relationship with your new vendor positive and productive. When issues arise, as they likely will even with the best system, goodwill and honest clear communication will save the day. Think about the reasons you said goodbye to your original vendor and ensure that everyone on *your* side of the table keeps their commitments and acts in accordance with organizational values, and that the project is managed effectively. Expect the same from your new vendor, and if you aren't getting what you need, address it immediately in the spirit of cooperation. Both sides want the project to succeed: you want a great system, and your vendor wants a satisfied customer (ideally one who will speak well of them in the marketplace).

You've done a lot of work in order to select your new system and provider – keep it going during the implementation phase and beyond, and you'll never have to say goodbye.







To learn about what our ILS solutions can do for *your*  
special library please visit us at: [www.lucidea.com](http://www.lucidea.com)



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