

HOW TO TALK TO CMMS VENDORS

GETTING THE MOST OUT OF SOFTWARE DEMO MEETINGS

When you're searching for CMMS software, it's essential to conduct effective and productive meetings with potential vendors. Good meetings are critical to understanding a company's capabilities and ensuring the software you're going to depend on will meet your needs.

Before you begin meeting with vendors, spend your time whittling down your "consideration set" of potential solutions to a few you really like. Read industry analyst reports and check out websites like SoftwareAdvice.com or Capterra.com. You may also want to spend some time on vendor websites to learn more. Once you've got some top contenders identified, it's time to schedule a few meetings.

What to Expect

A capable, professional CMMS sales rep can be a great asset during your selection process. If she's doing her job correctly, you should feel like you're receiving a valuable service—not being "pitched to." Typically, a first call with a rep will be a "discovery" call. The rep should spend the bulk of her time listening and asking questions to learn as much as she can about your specific needs. Expect this call to take 20-30 minutes, more if your requirements are complex.

At the end of the discovery call, your rep will likely ask to schedule a longer session, or "demo," to provide you and your team with detailed information on their company and product, along with a live software demonstration. In some cases, this may be an in-person meeting, but the majority of demos now are conducted via online presentation tools like Webex or GoToMeeting. A talented rep will use the demo meeting as an opportunity to present a solution tailored to your expressed needs and to begin answering more of your team's detailed questions.

Depending on the depth and breadth of your requirements, and the size and availability of your selection team, one or more demos may be needed. Ultimately, though, your goal is to provide enough information for the rep to provide you an accurate proposal and price quote.

Know Your Questions

The best thing you can do to make meetings productive is plan ahead. Write out the questions that are important to your team and have them handy for your calls.

Have a Checklist

Build a checklist to make sure you know your stakeholders and what they require from a CMMS solution. Use the starter checklist on Page 2 as a guide.



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A Checklist for Productive Vendor Meetings

Are you ready to communicate your company's requirements?

- Have you asked your company's stakeholders for their questions, concerns, and needs?
- What do users say is most important to them? What are they worried about when faced with learning a new system?
- How can you help your IT Manager commit to supporting a new application?
- What does senior management want to achieve with your purchase?
- Do you know the processes and lead times required by procurement?
- Does finance agree there's money to fund your purchase? How do you get them to release funds and approve payment?
- Have your legal and compliance departments given the ok? Do you know how to satisfy the regulations and internal procedures they are accountable for?

Do you know what functions you want to see in the demo?

What are the "must-have" functions you want to see?

The following list is a good place to start.

- Asset Records
- Employee Records
- Work Order Management
- Preventive Maintenance Scheduling
- Service Requesting
- Service Request Management
- Inventory Management
- Mobile Usage
- Media Integration
- Dashboards
- Reporting
- Key & Lock Management
- Vendor Management
- Cost Center & Budget Tracking
- Detailed Financial/TCO Tracking
- Customization
- Condition-based Maintenance
- Barcode Scanning
- Purchase Requisitions

Who should attend product demos?

Have you confirmed demo attendance and participation with each person and their manager?

What are your pricing, implementation, support, and training needs?

- Will you purchase the application outright or subscribe to it as Software-as-a-Service (SaaS)? If purchased, will you host your application in-house or do you need to outsource this?
- Can you describe the implementation assistance you'll require?
- How many people from your company need to be trained? Are different levels of training for in-house application support needed?
- Can the vendor provide the after-purchase support your stakeholders require?

Tailor the Demo to the Audience

Engage your rep to organize demos and follow-ups in a way that meets your team's specific needs. For example, your IT stakeholders might have enough questions and concerns to merit a meeting focused only on technology and support. Your finance people may only be interested in attending a meeting to consider purchase options. Most are probably interested in a demonstration of functionality and the user interface. Make it your job to know, and communicate this to the rep.

Have Specific Goals for Each Discussion

Plan meetings so that participants are confident enough to say, "When this meeting is over, I will have this," or "I will know that." Then work with your rep to deliver on audience expectations.

Be Involved. Be Clear. Get Results.

Effective CMMS vendor meetings require good planning. Know the answers you need. Know who must attend. Take an active part in the outcome. When you're sufficiently prepared for meetings, you'll control the information you need to recommend the best option for your company. When it's time to decide, you'll be certain enough to say, "That's the CMMS for us."



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