

*The Process For Selecting
Your New LIS
Traditional and
Non-traditional Methods*

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TOPICS

- Considerations in Evaluating and Selecting an LIS
- Traditional and Non-Traditional Approaches
- Demonstrations
- Telephone References
- Site Visits
- Corporate Visit



LIS Evaluation and Selection

A multi-phased process

- Do I need a new system?
- Who's good? *Identify viable candidates*
 - *Best of breed/Single vendor*
- What'a they got? *Obtain system and corporate information*
- What'll it cost? *Obtain cost quotations*
- Ask and listen *Telephone reference checks*
- See it, feel it, touch it *Onsite demonstrations*
- Visit peers and validate *Possible site visits*
- Tighten the screws *Contract negotiations*
- Go to their house *Corporate visit*



EVALUATING AND SELECTING AN LIS

- Obtain valid current information
- Understand/document your major needs
- Avoid “paralysis through analysis”
- Achieve high confidence and comfort
- Make a decision



SELECTION FACTORS INFLUENCING THE LIS DECISION

- Functionality to Meet Needs
- Compatibility/Synergy With Other Systems and Networks
- Growth Potential (Hardware/Software)
- Cost (Hardware/Software)
- Relative Value of Vendor Alternatives
- Support/Maintenance Costs

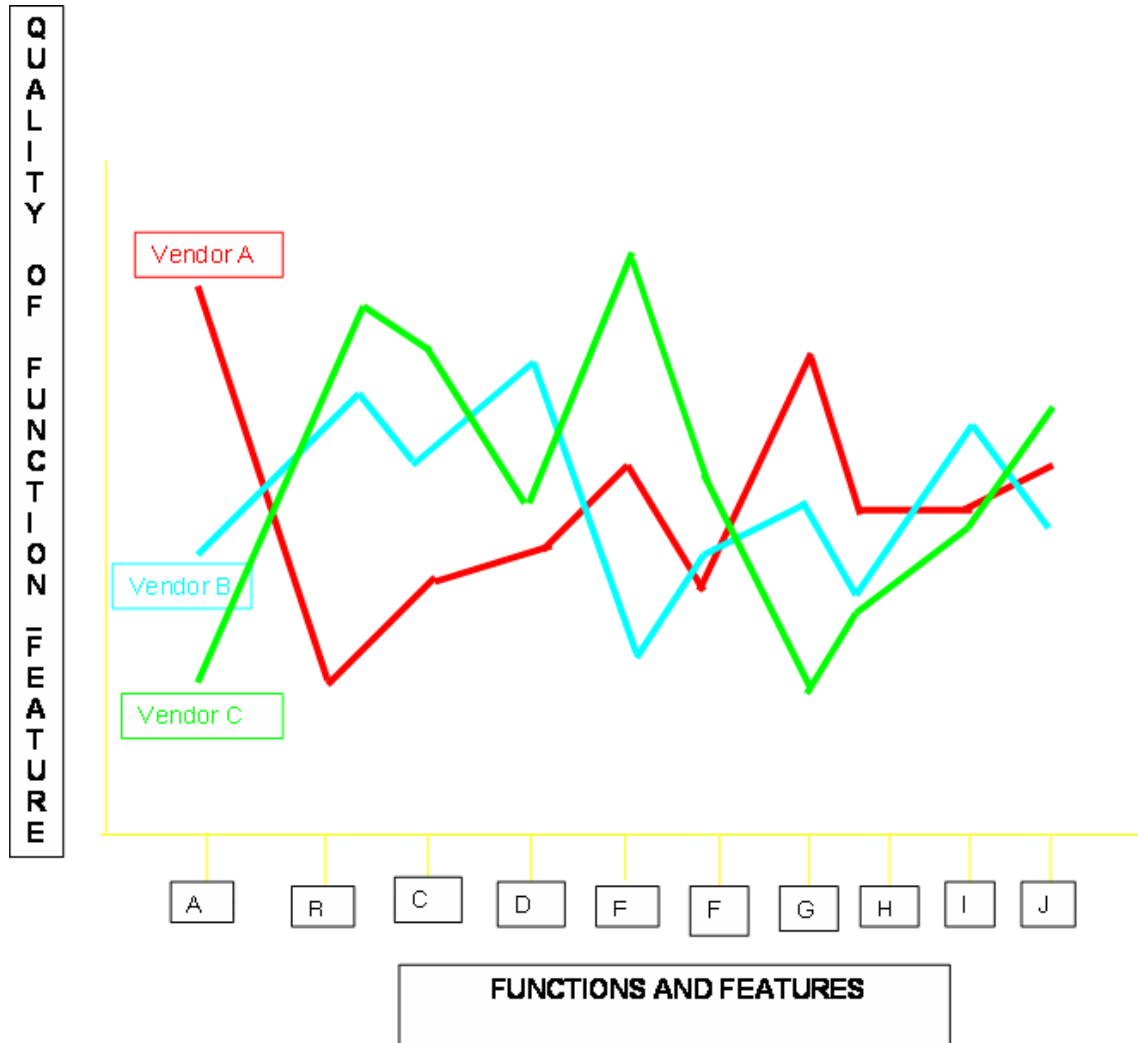


SELECTION FACTORS INFLUENCING THE LIS DECISION

- Vendor Support Reputation
- Transferability of Software License
- Schedule/Time to Implement
- Vendor Corporate, Financial Stability and Strategic Direction
- Internal Infrastructure Required to Install and Support



LEADING VENDORS ARE COMPARABLE OVERALL BUT SELECTION IS BASED ON THE QUALITY PATTERN OF FUNCTIONS AND FEATURES THAT ARE OF THE GREATEST IMPORTANCE TO THE LABORATORY



TIME FOR SOME ALPHABET “SOUP”

- RFI - Request For Information
- RFQ - Request For Price Quotation
- RFP - Request for Proposal



RFI - REQUEST FOR INFORMATION

- Basic Inquiry
- Initial Screening
- Qualification Of Vendor
- Corporate Background
- Product Characteristics
- Users List



RFI - REQUEST FOR INFORMATION

- Sent to broad range of vendors
- Provides description of your laboratory
- Request product, corporate and user information
- Experience with similar laboratories



RFQ - REQUEST FOR PRICE QUOTATION

- May be used to further screen candidates
- Establishes affordability
- Validates vendor understanding of requirements



RPQ - REQUEST FOR PRICE QUOTATION

- Sent to qualified vendors
- Specific statement of system requirements
 - Major functions required
 - Number of users
 - Number of devices by type
 - Number of locations
 - System interfaces
 - Instrument interfaces
 - Network diagram
 - Mandatory contract terms



RFP - REQUEST FOR PROPOSAL

- Detailed analytical form
- Differentiating questions
- Encompasses RFI/RPQ elements
- Consider evaluation process in advance
- Not the final step
- May not be necessary



RFP - REQUEST FOR PROPOSAL

- Voluminous response
- May not be comparable across vendors
- Question responses may/will be ambiguous
- At best, an imperfect form but can help to evaluate.



EVALUATION SEQUENCE

Traditional

- RFI - If need information about vendors
- RFP - Detailed Questionnaire
- Onsite Demonstrations - Sequenced
- Site Visits - Vendor Selected
- Contract discussions



SUGGESTED SEQUENCE #1

Semi-Traditional

- RFI - If need information about vendors
- RFI/RPQ combination - If vendors known
- Telephone Reference Checking
- Onsite Demonstrations - Concurrent
- Site Visits (Local...Maybe) Like Yours
- Corporate Visit(s)
- Contract discussions



SUGGESTED SEQUENCE #2

Non-Traditional

- Prepare Requirements Document
 - Functional Needs
 - Operational Needs
 - Performance Needs
- Send to 2-3 Pre-Selected Vendors
- Corporate Visit(s)
 - Requirements Discussions
 - Demonstrations
 - Pricing Discussion/Negotiation
 - Contractual Issues



SUMMARY

- Get Valid, Current & Comparable Data
- Focus On Key Issues
- Get mandatory contract terms visible up-front
- Become Confident And Comfortable
- Make A Decision



GETTING THE MOST FROM LIS DEMONSTRATIONS



GETTING THE MOST...

- Consider your priorities
- Consider the good as well as bad in your present system
- Prepare questions, playscripts in advance
- Have concurrent vendor demos (multiple on same day)



GETTING THE MOST...

- Submit questions and playscripts to vendors in advance of demo
- Require vendor to respond to playscripts
- Allow vendor to show their uniqueness



GETTING THE MOST...

- SEE VARIOUS PROCESSES
 - -Beginning to end
 - -Use Playscripts
 - -Get answers by seeing – NPO
- OPERATIONAL, PROTOTYPE OR DEMO?
- TRY IT YOURSELF
 - -Hands-On with vendor guidance



GETTING THE MOST...

- ASK QUESTIONS
 - Vendor responsible for understanding
 - This is YOUR profession
- COMPARE WITH OTHER VENDORS
 - Ability to meet playscripts
 - Bests and worst
- RETURN TO RE-VISIT VENDORS
 - -Confirm observations
 - -Answer remaining questions
 - -Firm up evaluation/ratings



GETTING THE MOST...

- RECORD YOUR OBSERVATIONS
 - -Detailed question sheets and notes
 - -Playscripts
- RANK ORDER PREFERENCES
 - -Strong and weak points
 - -Why ranked #1, #2, #3
 - -Assign “merit” value to each
 - -10 = Perfect 1 = The Pits



GETTING THE MOST...

- 90% of the time, the vendor-of-choice” is determined at the end of the demonstrations
- What’s left is to validate your conclusions
 - Telephone reference checks
 - Site visits
 - Corporate office visit



TELEPHONE REFERENCE CHECKS

- Inexpensive validation
- Peer-to-peer interchange
- Can make many contacts
- Can call anyone you want
- No vendor pressure



SITE VISITS

- Often low ROI
- Only visit “good” sites
- Hard to find good matches to your lab
- Irrelevant inter-personal impact
- Expensive visit – vendor’s rarely pay
- Telephone references more cost effective
- May be worth while in conjunction with a corporate visit



CORPORATE VISIT

- Usually reserved until a single “vendor-of-choice” has been selected
- In cases of “too close to call” separate office visits are appropriate
- Often, the “vendor-of-choice” will cover your teams’ expenses for the visit
- Opportunity to “close” the deal.



CORPORATE VISIT

A Corporate Visit is a:

- ❖ Technical
- ❖ Political,
- ❖ Financial,
- ❖ Social
- ❖ Contractual

Event



CORPORATE VISIT

What you need to do

- Answer remaining functional/feature and technical questions
- Meet the Principals of the company
- Meet those folks who will do your installation and ongoing support
- Finalize the list of all hardware, software, implementation schedule and other items and services required
- Determine resources and timeframes for implementation
- Discuss, negotiate and, perhaps, agree on the contract
- Socialize and enjoy



Make a Decision

- Select the vendor
- Complete contract terms
- Start implementation planning

Do not underestimate the amount of time required to finalize contract & start implementation planning!!!



Questions?

