



building stakeholder intelligence

Software Selection – Informed decisions save time and trouble!

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Stakeholder Engagement has become complex and in many organisations the required functionality of a software solution is far beyond the scope of Excel or basic Access databases.

So what do we do?

In recent times, a plethora of software for Stakeholder Engagement has become available on the market that promises all sorts of features and functionality and a range of delivery options. I am not going to address any products here, I am going to address the areas that you, as potential buyers and recommenders, need to think about before stepping down the path or making a purchase.

Functionality

Before you even consider a vendor, you need to sit down and determine what the functionality is that you really need and want. The first step is sitting down with colleagues in other projects and the CSR (Corporate Social Responsibility) people to fully determine their needs. It is likely that if what you are meeting their needs as well you can cost share across projects and groups.

The range of available potential functionality is very broad, but what is it you actually need. Write it down, utilise some mindmapping software and prioritise the need. Don't get "Like to have" confused with "Must Have"!

One place to start is to look at what reporting you require, whether it be internally or to external regulators such as the Alberta Energy and Utilities Board or your Annual CSR Report. Then see what software can provide the data you need or be modified to meet those requirements. Ideally, if an "off the shelf" package can meet 80 to 85% of your needs, it is a good fit.

Scalability

Because you are in an organisation that has multiple projects and multiple business units that could use software of this type, it is crucial to understand whether or not the software you are considering is scalable. That means that the software can meet the needs of the broader corporate, maybe not on day, but certainly over time. As an aside we recently had a client who had 7,000 stakeholders in a single project and needed a database solution that could deal with an extra 30,000 stakeholders in a 6 month period. Software in this day and age needs to be able to grow exponentially as stakeholders demand more and more involvement with projects.

Security & Privacy

Often companies have "Project X's" which are those confidential projects that are not yet off the ground and are certainly not public. Not only do those projects need to have secure status, but in addition, people who are unaware of it's existence do not even need to know these projects exist within the database. A useful toolset needs to have multiple levels of security and the ability for those running the software to manage that security.

Remembering that once Project X is no longer "confidential or secret" it needs to be easily made available for corporate reporting purposes.

Privacy is an interesting question. There are two aspects to it

1. In Canada it is against the law to export Personal Information from the Federal boundaries of Canada and if a company wants a third party to host and manage an application there are guidelines laid out as to what is required in terms of contracts and guarantees
2. An application needs to be auditable so that, should the occasion ever arise that a complaint is lodged with the Privacy Commissioner, you can prove what actions were taken or not as the case may be within the database.

Delivery

Applications can be delivered from your own network and made available in various ways, They can also be outsourced to third parties.

Prior to stepping down either path it is a good idea to engage with your IT department and get a good understanding of their perspective. They may well have rules (SOE – Standard Operating Environments) that place restrictions on what you can buy technically and whether or not they will allow you to use an externally hosted option.

There are pluses and minuses to both options – however I strongly recommend that before you step down the externally hosted option you fully understand that organisations policies and procedures and get them to provide you with a Service level Agreement (SLA). The SLA defines their roles and responsibilities in terms of your data, protection of it, back ups, uptime etc. I will address this a little later.

A warning do not gloss over SLAs especially in relation to externally hosted situations. If you are in Canada the Privacy Commissioner requires that you have a contract in an externally hosted situation and you and not the external provider will be responsible and accountable for the security of data.

If you are using a third party hosting package or provider then find out what happens to your data at the end of the contract – are there additional costs and what formats will the data be in.

Support – Pre, during and post implementation

Often promised, not always delivered – technical, implementation, training and consulting support is crucial. Too often, relevant support is not made available by a vendor and what should be a simple implementation does not go as well as expected.

Determine how you will be supported, find out whether they can really do what they say – talk to other clients, see how they respond to issues.

IT Fit

All organizations have Standard Operating Environments (SOE). These are determined by your IT Department and can impact on what you can actually buy from a technology perspective and where the application is physically located. IT departments are often seen as demons within an organisation, but they are the protectors of both data and technology within a larger company, therefore they have a huge impact on what is feasible and what can happen. Get them onside early as it will save everyone time.

Service Level Agreements - SLAs

SLA's are absolutely vital, especially if the application is externally hosted. If the vendor is not prepared to commit in writing as to how they secure your data, their backup procedures, where the back up information is held (same server as the application or on a third server in another physical site), what level of equipment they use, support on those servers, speed of data lines, whether they run mirrored servers, how quickly they will fix issues (response



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times) then you have to seriously consider whether you use them. You have to remember that you DO NOT need to be caught up with breaches of privacy.

Equally if the application is hosted internally on your network then you should expect to get a SLA detailing response times, what is and isn't included as support, and so on.

Upgrades

Does the software provider provide upgrades and if so what influence do you have if any on those upgrades. In other words as your needs change does your provider also meet that growth with changes to the software. And if so how often and how is it charged .

User Groups

Does the vendor have a user group. User Group meetings are an ideal means by which a client can have input to the product and the future roadmap. After all, you are using the software on a daily basis and know what is needed much more so than a software developer.

Ongoing Costs

Get the ongoing costs defined up front so it is clear exactly what you are going to be paying and when, so you can appropriately budget. Once the excitement of having a new piece of software has passed, we forget that we have made a commitment to pay \$X annually.

If you are renting software then get all costs defined, payment dates, and how the payment is expected.

If a payment date is missed, the vendor could suspend the software causing you a great deal of embarrassment. Is there a charge should you default?

If the application has annual maintenance and support fees ensure that they are defined, again define what you get and when it has to be paid.

Conclusion

Don't be in a rush. Ensure you have considered the above points and others before you commit. Don't let salesmen push you into making decisions before you are ready. If a consultant is making a recommendation – make sure it is non-biased. Ensure that what you do purchase or rent is going to be flexible enough for you to grow.

Jurat Canada Inc.

Jurat is a full service provider and the market leader in both On-Demand and Installed software solutions for Stakeholder Management and Engagement. Founded in early 2002, Jurat's initial goal was to offer a very sophisticated Community Engagement Tracking solution to a wide range of companies of differing sizes across a wide range of industry sectors. Jurat has recently released our 5th generation product, developed with the assistance of clients in Oil & Gas, Mining, Utilities, and Government and Indigenous groups.



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Established first in Australia, Jurat, now has expanded, with offices in New Zealand, Canada and the United Kingdom (late 2007). Global expansion provides a great benefit from a local perspective, with resources allocated to localized implementation and customer support services.

Jurat holds close to our heart the relevance of our Stakeholder Engagement and Management solutions and ensures our ongoing relationship with clients and their involvement in the future of the product is maintained.

Jurat offers a range of solutions, dependent on the company size and requirements. Our solutions cater for all sizes of companies/organizations in whatever industry they are in.