

# How to Select a Library Automation Vendor

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# Where to start?

- Why are you doing this? i.e. what are your goals and objectives for this software?
- Perform information audit to determine and identify client information needs and information seeking habits
- Determine how ILS software can meet those needs
- Get buy-in from stakeholders (money gatekeepers, IT, etc.)

# Where to start? (con't)


- Is this for externally or internally produced documents or both?
  - are they digital, print or both?
- What kind of integration for access/searching do you or your client need?
- What is the budget? (remember there will be one-time up-front costs as well as ongoing costs)

# Where to start? (con't)

- What sorts of features do you and your users want and need?
  - Abstracts
  - Images (e.g. book covers)
- Does it integrate Web 2.0 technologies easily or at all?
- Search interface
  - Text
  - Visual

# Some things to consider

- Do you already own an ILS?
  - how will the new software handle importing that data?
  - will there be additional costs for this?
  - how will staff be trained to use it?



# Does this ILS software need to integrate with other search services you subscribe to?

If so...

- does the ILS software allow for this
- what are the federated search options and costs

# Hosted offsite or on your own server?

Is there proprietary information that should not be hosted outside your organization's network? If so, you'll need to buy and host the software or find a hosted solution that includes a VPN.

# Identify all your potential software options

- ILS
- ECM
- DAM
- Off-the-shelf or open source



# Off-the-shelf ILS

- will you host or will it be hosted
- what kind of tech support will you have both in-house and from vendor

# Open source ILS software

- What kind of tech/IT support do you have in-house?
- If you customize it, who will maintain and upgrade it?
- What are the cost differences?

# Content Management or DAM Software

- Is this the right option instead of an ILS?
- Does the vendor understand library information needs?

# Narrow the list of potential solutions/vendors

- Is this a company within North America?
- Is English their first language?
- How long have they been in business?
- Do they have experience with similar clients?
- Is their product within your budget range?
- Test their customer service

# Choose the semi-finalists

- Email each semi-finalist your RFI
- Send a cover email and deadline date to hear back
- Get references from other users

# Schedule and test

- Sales presentations
- Trial versions
- Complete versions of tech support materials
- Continue to narrow down vendor list
- Treat vendors with respect & reward them with referrals

# Your final choices

- Report & recommendations to stakeholders
- Set up a meeting to present your report and recommendations

# What's next?

- Sign contract with vendor
- Prepare timeline for implementation
- Get to work!



# The challenging part is just beginning...

- Alpha and beta testing and implementation with all levels, if possible, of organization
- Revisit strategies based on testing
- Make needed changes to strategies and retest
- Demonstrate business value (and don't stop)

# Resources to get started

- Computers in Libraries (search: integrated library systems)

<http://bg.computersinlibraries.com/>

- Library Technology Guides

<http://www.librarytechnology.org/>

- Librarians' Yellow Pages

<http://www.lyponline.com/>

# More resources

- Capterra

<http://www.capterra.com/>

- Visit vendor booths at conferences

# Final tips...

- Do your due diligence up front
  - It will save you money and heartache later
- Take advantage of all the vendor training you can
- Once you've tested it be sure to roll it out with great fanfare and training of staff
- If you are happy with the software, tell others

# Thank you and be in touch!

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