

Request for Solution

Joan R. Duke, FHMISS & George Bowers, FHIMSS

Having worked in the health care information technology industry for many years, we are more and more convinced that's not the technology". Technology is an important means by which organizations can improve operational efficiency and quality of care. Yet as we know, many technology projects fail to achieve these objectives. There are many reasons for this failure, but one of them is a system selection process that does not reflect the needs, priorities, and culture of the organization.

A failed system selection process often begins with the belief that the desired technology products will by themselves lead to the Holy Grail of improved health care delivery. In the past, we let the functional and technical capabilities of existing vendor systems frame the selection process. This obscured the actual needs, priorities, and the cultural requirements of the organization.

For this reason, we no longer believe that a detailed request for proposal (RFP) is the best way to ensure a good "marriage" of an organization with technology. We do not mean to imply that RFPs are all bad. In fact an organization still needs functional and technical descriptions for products and services that are precise enough to lead to a well articulated contract with protections for both the organization and the vendor.

What should be avoided is an RFP approach that includes detailed checklists of functional and technical requirements, sent to many vendors, which then need to be sifted through to determine the right vendor. Instead we suggest using a shorter Request for Solution (RFS) to articulate overall objectives, desired outcomes, priorities, and what the organization hopes to achieve by implementing a new system.

The RFS process begins with screening the vendor on unique organizational requirements using criteria that clearly differentiate vendors on those factors. Instead of asking the vendors to respond to the organizations detailed requirement we ask them tell us how their system provides a solution to the problem thereby narrowing the field to those vendors who can best deliver the solution.

Once the vendors are screened and the selection group of executives and affected stakeholder are in alignment, we frame an RFS document that contains many of the elements of a RFP, but is articulated in terms of the problems to be solved. The first thing we present are "minimum mandatory" requirements that are absolutely needed by the organization and we let the vendors know that they will have to provide a "live demonstration" of their solution as the next step in the evaluation process.

We also include in the RFS background information about the organization and instructions for preparing the response. The other sections of the RFS allow the vendors to detail the components that make up their offering. These include:

- Application (licensed) Software
- Hardware and third party products
- Implementation Services including training, system build, data migration, and integration
- Ongoing Support Services
- Costs.

There are also sections in the RFS which include questions to determine the vendor's position in the market, how they differentiate themselves from their competitors, their financial viability, contract terms and conditions, customer service record and other factors which will make the vendor a good partner for the long term.

Upon receiving proposals, an objective, numerical evaluation tool is used to score the responses by an evaluation team made up of executives, key stakeholder and information systems personnel. The summary of the numerical results allows for an objective discussion of the difference among the vendors. A ranking of the vendors is done in by this group to determine the vendors that will be invited to demonstrate their offerings.

Demonstration scripts, which are based on real world workflow scenarios (user cases), are sent to the vendors. The vendors come on site to demonstrate in a structured setting so the participants can evaluate their solutions in a "real world" environment.

From the demonstration evaluation, it is usually apparent who is the finalist, and the team can concentrate their effort on the verification of the decision. This is also the time where the participants can reflect on what is most important to a successful implementation. Any questions that arose during the evaluation of proposals or the demonstration can be sent to the vendor for follow-up.

The verification steps include:

- Vendor clarifications to follow-up questions
- Client reference calls
- Client site visits
- Corporate site visits
- Due diligence on contract terms and conditions

If done as described, the entire process becomes a team building exercise which results in the best decision for the organization and prepares it to go on to the more difficult and rewarding step of system implementation.