Guidelines for Evaluating Vendors and Training Programs

API PUBLICATION 1220
SEPTEMBER 1998

American
Petroleum
Institute

**Helping You
Get The Job
Done Right.**SM

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Manufacturing, Distribution and Marketing Department

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Guidelines for Evaluating Vendors and Training Programs

Whether you are purchasing one program, product, or service to meet a specific need, or are evaluating a number of training providers to develop a complete training and development program for your facility, you will soon discover that there are a number of vendors that will meet your needs. Multimedia companies, performance consultants, product developers, workshop presenters—whatever the title—they all claim to have the answer to improving your training and development outcomes and saving you time and money in the process.

Whether you are new to the training field or are an experienced practitioner, choosing a vendor that meets your needs can be a difficult and time-consuming process of evaluation and re-evaluation. The trainer may consult other trainers from API districts or from their own network of industry contacts. But that may not provide enough guidance, and even after you have collected such information, you may still be unsure of whether you made the correct decision.

The American Petroleum Institute's Central Committee on Training and Development recognized this difficult decision making process, and based on years of cumulative experience in the training field procuring vendor products and services, they have developed a guide to help you choose a vendor.

Enclosed is a checklist and an explanation for each item. Use of the checklist and evaluation tools can help you evaluate and choose the vendor that is best for you. As the trainer goes through the checklist, he should consider the following guidelines:

1. Each criterion does not carry equal weight. Realize that some questions will be more relevant than others.
2. Not all questions will apply. The trainer should decide which are more important based on their own needs.
3. The questions are guidelines and should not be construed as requirements by the API Central Committee on Training and Development, or any other group.
4. The criteria have been divided into modules so the trainer can use all or part of the checklist.
5. There is no correct amount of "Yes" or "No" answers required to accept or reject a program.
6. Extra space has been included on the checklist to add questions specific to individual sites.
7. One or more criteria may not be relevant for the trainer's particular needs or circumstances.

Disclaimer: This document is intended to serve only as a guide; it does not reflect API's endorsement of any particular vendor or training program.

CHECKLIST FOR EVALUATING VENDORS AND TRAINING PROGRAMS

EVALUATION CRITERIA	Y	N	N/A
1. PROGRAM DESIGN AND FUNCTIONALITY			
1.1 Program matches the company's learning objectives and company's strategic direction.			
1.2 Deliverable media is compatible with learning and organizational style			
1.2.1 The program content matches the culture and style of the organization.			
1.2.2 The learning design and approach will be effective with the target audience.			
1.2.3 Examples are relevant to the industry.			
1.3 Programs come with a leader's guide.			
1.4 Company has a train-the-trainer program.			

CHECKLIST FOR EVALUATING VENDORS AND TRAINING PROGRAMS

EVALUATION CRITERIA	Y	N	N/A
1.5 Programs can be delivered just-in-time.			
1.6 Programs are portable.			
1.7 Programs can be customized.			
1.8 Program can be delivered in modules.			
1.9 Program can meet delivery timetable.			
Comments:			
2. TECHNICAL/ISD PARAMETERS 2.1 Meets Instructional Systems Design Criteria.			
2.1.1 Contains performance-based objectives.			
2.1.2 Content supports objectives.			
2.1.3 Contains a lesson plan.			
2.1.4 Identifies an intended audience.			

CHECKLIST FOR EVALUATING VENDORS AND TRAINING PROGRAMS EVALUATION CRITERIA	Y	N	N/A
2.1.5 Post-testing evaluation supports content and objectives.			
2.1.6 Contains pre-testing evaluation.			
2.2 Uses credible subject matter experts (SMEs) in development and review.			
2.3 Program was validated with user group.			
2.4 Environmental and federally mandated training requirements on health and safety training concerns are addressed.			
2.5 Programs have job aids and support tools.			
Comments:			
3. PROGRAM QUALITY 3.1 Program is valid for the industry and contains industry-related images and examples.			
3.2 Program is of recent vintage and reflects current practices.			
3.3 Program provides for continuous improvement.			

CHECKLIST FOR EVALUATING VENDORS AND TRAINING PROGRAMS

EVALUATION CRITERIA	Y	N	N/A
3.4 Program can be delivered in multiple forms of media.			
3.5 Program are professionally produced and published.			
3.6 Program engages the learner.			
3.7 Demonstration program is available for preview.			
3.8 Program is not in beta format.			
Comments:			
4. VENDOR EVALUATION 4.1 Company supplies a list of current users.			
4.2 Company background and history verified. The vendor has experience in the industry.			
4.3 Company has a physical location and is easily accessible if needed.			
4.4 Vendor can supply credentials on management and key personnel.			

CHECKLIST FOR EVALUATING VENDORS AND TRAINING PROGRAMS

EVALUATION CRITERIA	Y	N	N/A
4.5 Vendor can supply current work samples.			
4.6 Vendor listens to your needs and recommends products to meet those needs.			
4.7 Vendor can supply trainers to deliver programs.			
4.8 Program has purchase/lease options.			
4.9 The vendor will not need to overly rely on your company for expertise.			
4.10 Licensing arrangements are available.			
Comments:			
5. VENDOR TECHNICAL SUPPORT 5.1 The vendor has instructor-led support.			
5.2 The vendor has support for their videos and workbooks.			
5.3 The vendor has support for their CBT materials.			

CHECKLIST FOR EVALUATING VENDORS AND TRAINING PROGRAMS

EVALUATION CRITERIA	Y	N	N/A
5.4 The vendor has support for their distance learning materials.			
5.5 Support is available on demand.			
5.5.1 Phone support available during times it is needed.			
5.5.2 On-site support available if needed.			
Comments:			
6. SYSTEM COMPATIBILITY 6.1 The program can operate over company LAN or Intranet.			
6.2 Software is compatible with operating system.			
6.3 System requirements have been reviewed with IS personnel.			
6.4 Vendor is familiar with company's computer system.			
Comments:			

Support for Checklist Items

1   Program Design And Functionality

1.1   PROGRAM MATCHES THE COMPANY'S LEARNING OBJECTIVES AND COMPANY'S STRATEGIC DIRECTION

If you have done a needs analysis, you most likely have developed learning objectives to meet the organization's strategic needs. *The training program's objectives should match your company's needs.* Review the program objectives and see how close they match what you and your company have determined are your strategic needs. Usually promotional literature or the program overview list the program outcomes. Compare these with your needs to see if the training program can help you achieve your objectives.

1.2   DELIVERABLE MEDIA IS COMPATIBLE WITH LEARNING AND ORGANIZATIONAL STYLE

There are a variety of training programs on the market and many of these programs cover the same subject matter, but in different ways. Which program is best for your organization? Here are some questions you may want to ask:

- Are new topics effectively introduced and overviewed?
- Is new terminology adequately introduced and defined?
- Is information logically sequenced?
- Does content move from the general to the specific?
- Are there opportunities for trainee involvement and participation?
- Is there adequate media to support each lesson?
- Is there provision for adequate practice and feedback?
- Is there provision for mastery testing?

Further, you should consider the following:

1.2.1   The program content matches the culture and style of the organization

The training program and its content and delivery should depict the style of your organization in order for the learner to grasp the underlying concept. The examples used to illustrate a concept must have some relevancy and context in order for the employee to recognize that the idea will work in your organization. For instance, a training program on Conflict Resolution depicting a team-based environment may not be appropriate if your organization's management style is not team-based. Or, a program that depicts employees in suits and ties in a rigid, structured environment may not be accepted by your employees if your organization dresses business casual and is open and active.

1.2.2   The learning design and approach will be effective with the target audience

The program's approach to learning meets your needs when knowledge transfer is done with little or no effort. For instance, if your employees are highly technical and are most attentive in a highly structured, highly academic atmosphere, the programs may need to be textbook-based in order to stimulate learning. A workshop that is highly interactive, complete with games and analogies, may not be effective with this audience. Some additional questions you should consider are:

- To what degree can you tailor and modify the program to meet your specific learning styles?
- If your company is multi-cultural, must the program be available in different languages and fit a variety of cultures? Does the program meet those criteria?
- Will the program make the best use of trainees' time, covering the skills and issues you want addressed?
- What evidence exists that the program meets its intended learning objectives and addresses your business needs?

1.2.3   Examples are relevant to the industry

The introduction of a concept to the trainees allows them the opportunity to become exposed to the knowledge and skills you want them to acquire. *However, using an example of how the concept applies to their work helps the employees internalize the material and make it a part of their behavior.* Good examples make learning difficult concepts easier; and placing those examples in the context of the industry make them that much more relevant.

1.3 PROGRAMS COME WITH A LEADER'S GUIDE

The trainer's or leader's guide is an essential element of a fully-developed training program. Without a leader's guide, instructors have no path to follow and may find it very difficult to present the program in its proper context.
Additional questions to consider:
- Are there documented instructional strategies for presenting each lesson?
- Is there a schedule showing the duration of each lesson and the entire course?
- Is there information covering:
  - Classroom set-up?
  - Equipment requirements?
  - Pre-course assignments?
- Are there procedures for administering and scoring mastery tests?
- Are the student materials well organized and legible?
- Are projected media items designed for easy viewing?

1.4 COMPANY HAS A TRAIN-THE-TRAINER PROGRAM

A train-the-trainer program ensures that your trainers present the material the way the program designer intended it to be presented. Many training vendors provide train-the-trainer programs for their more sophisticated programs, and vendors who license their programs usually require the licensee to attend their certification program as a condition of sale. The format for lesson plans and other instructor support materials will vary from one vendor to another. However, they are usually consistent for a single vendor. Train-the-trainer programs allow trainers to become familiar with a vendor's format which is especially helpful when your perspective trainer for the program is not a full-time trainer, but rather is a subject matter expert.

1.5 PROGRAMS CAN BE DELIVERED JUST-IN-TIME

As demand for your time and your employees' time increases, you will have fewer opportunities to deliver training programs with much notification. *The programs you choose should be able to be delivered when and where you need them in order for you to respond to your employer's requests.* For instance, if you are developing a new-hire orientation program, the program should be deliverable when the new hire starts, not six months after he began. As such, CBT or video may be helpful, especially in cases where new hires are brought on board at different or staggered times.

1.6 PROGRAMS ARE PORTABLE

Programs should be portable not only for the learner but for the trainer. Whether the location is in another part of the plant or another part of the country, the ability to take the training to the learner makes it more valuable to the learner as well as enables more learning to take place when it is needed, not when it is easiest to deliver.

1.7 PROGRAMS CAN BE CUSTOMIZED

While many off-the-shelf programs are effective in your organization, none are as effective as custom-built programs that are designed specifically for your organizational need. However, custom-built programs may be expensive and take time to produce. *The solution may be to customize an off-the-shelf program to meet the culture and needs of your organization.* At one time, it was virtually impossible to customize a CBT program; however, many vendors now provide the opportunity for the buyer to insert photos of their plant and content-specific information into the program to give it a customized look at an off-the-shelf price. The more adaptability you have, the more effective your programs can be for your specific site.

1.8 PROGRAMS CAN BE DELIVERED IN MODULES

The trainer may not have the requisite time to deliver the program in a continuous flow. *Programs should be divided in logical time frames so that they can be presented over a number of sessions.* For example, a program on maintenance may need to be delivered in one or two hour increments in order to minimize a craft worker's time off-shift or to keep overtime costs down.

1.9 PROGRAM CAN MEET DELIVERY TIMETABLE

If a program needs to be modified or customized, the trainer should have an assurance that it will be delivered in the time requested. Talk with the vendor, and if necessary, place a timetable in a contract to guarantee timely delivery.

2   Technical/ISD Parameters

2.1   MEETS INSTRUCTIONAL SYSTEM DESIGN CRITERIA

Instructional system design (ISD) is the building block on which programs are developed. Following are the criteria that should be followed:

2.1.1   Contains performance-based objectives

Training programs should contain measurable objectives that will demonstrate a quantifiable outcome. A training program's written objectives should relate to how behavior is changed or skills improved. In addition to a training program offering the trainee knowledge, it should also provide skills that will allow him or her to function at a level or do a task that he or she was unable to do before completing the training program. An example of a performance-based objective would be: "Upon successful completion of this training program, the trainee will be able to describe how a respirator works and demonstrate the correct procedures for use." Note that the objective above indicates that upon successful completion of the training program, not only will the knowledge be obtained, but skills will also be acquired because the trainee will be able to demonstrate what he or she has learned.

2.1.2   The content supports the objectives

The program's content should support and adequately address each stated objective. In other words, does the training program actually do what it says it will do? If it says it will teach an employee how to operate a distillation tower, the materials in the program should show how it is done. Similarly, if the objectives state how to coach employees, the program should contain some job aids or other steps that help managers become effective coaches. The material should not simply infer how it is done, but should provide sufficient detail to fulfill the stated objective.

2.1.3   Contains a lesson plan

A lesson plan describes the steps you will follow in administering the training program so that it meets each of its objectives. Generally, a lesson plan should contain the following elements:
- A statement which establishes the focus of the training program and defines its boundaries, i.e., the target audience, the specific level of training, etc.
- An outline that shows the content structure of the program and provides a guide for how much time it will take to ensure that all of the program's objectives are met.

2.1.4   Identifies an intended audience

The program should state the target audience, that is, the group of people that the program is intended for. For example, is the program a basic entry level program, or is it structured more toward an advanced level? Has the program been designed for senior engineers or entry level process operators? In addition, the program should be designed to be most effective for the targeted.

2.1.5   Post-testing evaluation supports content and objectives

The measure of any program's effectiveness is it's ability to teach new skills and have the new skills become part of the trainee's behavior. *The quickest way to measure comprehension is with a test at the end of the program that evaluates the trainee's comprehension of the stated objectives.*
Questions you should ask during program evaluation are:
- Is post-testing designed to specifically determine the trainee's comprehension of the subject matter?
- Can all of the post-test questions be referenced back to specific points in the program?

2.1.6   Contains pre-testing evaluation

Adult learning theory states that adults only want to learn skills that they need to learn, and only if these skills apply to their jobs. In the event an employee already possesses the skills the program is designed to teach, does the training program offer a pretest option? *Pre-tests are offered so that trainees have the option to "test out" if they have an adequate understanding of the subject matter.* Pre-tests are effective if they are structured in a manner that truly determines a trainee's comprehension of the subject.

2.2 USES CREDIBLE SUBJECT MATTER EXPERTS (SMES) IN DEVELOPMENT AND REVIEW

SMEs add credibility to a program by providing technical guidance to the program, based upon their professional expertise. Without SMEs, a program may lack credibility.

Questions to ask are:

- Were the subject matter experts utilized in the program development recognized experts in the respective fields? For example, was the SME for a program on the subject of hearing conservation a certified industrial hygienist?
- Can the SME defend his or her subject matter if challenged by a regulatory agency?

2.3 PROGRAM WAS VALIDATED WITH USER GROUP

Validation ensures that an end-user is satisfied that the training program will accomplish what it claims to accomplish. Questions that should be asked include:

- What were the stages used in the program's validation process?
- Was the program "tested" within one company at one location, or, was it tested at several work locations within a company?
- Was it tested at several locations within several different companies?
- Was the validation process conducted within an industry similar in nature to yours?

2.4 ENVIRONMENTAL AND FEDERALLY MANDATED TRAINING REQUIREMENTS ON HEALTH AND SAFETY TRAINING CONCERNS ARE ADDRESSED

When evaluating a training program, *ensure that environmental concerns are properly addressed and the training programs specifically meet the regulatory requirements for a given job or task.* Environmental practices and procedures are equally important as those of health and safety. When evaluating training programs, closely monitor how these issues are addressed within the program. For example, ensure that "employees" portrayed in the program utilized proper personal protective equipment and followed safety procedures. Be wary of training programs that address regulatory issues in a generic manner. It is also important to note that some states and companies have additional regulatory requirements that may be stricter than federal requirements. The training program should adequately address and meet these requirements as well.

2.5 PROGRAMS HAVE JOB AIDS AND SUPPORT TOOLS

Training does not end after the program has been delivered. *Effective training programs generally provide job aids such as pocket cards or posters for trainees to help remind them of the material they learned and how to implement it.* Look for programs that provide these tools since it indicates the vendor has a long-term interest in the effectiveness and implementation in their programs.

3 Program Quality

3.1 PROGRAM IS VALID FOR THE INDUSTRY AND CONTAINS INDUSTRY-RELATED IMAGES AND EXAMPLES

The program should contain images and depict situations that are relevant to the industry. The videos, visuals, handouts, and other materials are industry-related and/or filmed in an appropriate industry setting.

3.2 PROGRAM IS OF RECENT VINTAGE AND REFLECTS CURRENT PRACTICES

The material should reflect current practices. This is especially true as it pertains to regulations, standards, or recommended practices. Look at the copyright or print date to show that it has at least been revisited for content and objective validity. This can be more important for technical skills training than for human resources training which does not change as much over time.

3.3 PROGRAM PROVIDES FOR CONTINUOUS IMPROVEMENT

As content changes, the vendor can offer updates to make the program current without the user having to purchase a new set of materials. This also ensures that programs are current with regulations and practices.

3.4 PROGRAM CAN BE DELIVERED IN MULTIPLE FORMS OF MEDIA

Programs should come in more than one form of media in order for the trainer to have flexibility. While some programs are strictly CBT, many programs can be adapted to present in more than one format, allowing the trainer to have flexibility to present

the material in a format most conducive for the learner and the situation. For instance, a program may have a videotape exercise; however, if a VCR is not available, a role playing simulation should be available in order to illustrate the concept.

3.5 PROGRAMS ARE PROFESSIONALLY PRODUCED AND PUBLISHED

Training programs reflect your professionalism, and they should be of sufficient quality so as not to detract your audience from the message that is being presented. For instance, CBT programs should have no bugs in them; videotapes should have be clear and crisp; job aids and workbooks should be laid out in a logical format.

3.6 PROGRAM ENGAGES THE LEARNER

Good training programs get the learner involved and active. Look for programs that have exercises to apply knowledge, tests to verify knowledge retention, and role plays to practice knowledge and skills. The learner should be sufficiently involved to make the training an active exercise.

3.7 DEMONSTRATION PROGRAM IS AVAILABLE FOR PREVIEW

Before making a substantial investment, you should be able to preview the programs. This is especially true of videotapes and CBT programs where you may want to verify that the program will meet your needs.

3.8 PROGRAM IS NOT IN BETA FORMAT

The program should be in finished format, not a beta (test) version. Beta programs, especially software programs, are developed to test the program's usefulness and functionality. It is often an indication that the program is not complete, and the user should expect program bugs. If the vendor is developing a custom program, a beta version may be acceptable since the location is a test site. However, off-the-shelf programs should be purchased in final format.

4   Vendor Evaluation

4.1 COMPANY SUPPLIES A LIST OF CURRENT USERS

The vendor should have a statement that encourages the user to obtain a list of names and phone numbers or organizations that have used the vendor's products and services. Buyers can ask many of the questions that appear on the checklist as a means of evaluating other users' experiences.

4.2 COMPANY BACKGROUND AND HISTORY VERIFIED. THE VENDOR HAS EXPERIENCE IN THE INDUSTRY.

An ideal vendor should supply the user with information on how long they have been in business and who is supported with their product; and they should work in the industry to have a good understanding of training needs and solutions. The user should also be instructed to review the copyright dates on printed materials, or production and release dates on video and CD products, and compare them to the information obtained from the vendor. Safety, emergency response, and environmental information that is more than a year or two out of date may indicate that the vendor may not be able to provide the service the user requires. Technical skills training should only be provided by companies that demonstrate an understanding of the industry.

4.3 COMPANY HAS A PHYSICAL LOCATION AND IS EASILY ACCESSIBLE IF NEEDED

The user should be aware of the vendor's locations and how they would impact:
- Shipping costs.
- Response time to repair and upgrade requests.
- Sales and marketing support.
- Training—initial and ongoing.
- Help or support desk service.
- Satellite offices and support they can offer.

4.4 VENDOR CAN SUPPLY CREDENTIALS ON MANAGEMENT AND KEY PERSONNEL

If you are purchasing services where you are unable to preview a product, *it is best to review the management and consultant credentials to ensure they have the background and ability to do the work requested.* Among the many indicators to look for are: degrees; association affiliations; awards or records of accommodation; past employers; past clients; and so forth to determine if the company is able to meet your needs.

4.5 VENDOR CAN SUPPLY CURRENT WORK SAMPLES

If custom work is being done, ask the vendor to provide samples of similar work to determine if they can meet your requirements. Examples may be outlines of custom workshops, CBT programs developed to support the roll-out of a specific concept, or methodologies in developing a needs analysis.

4.6 VENDOR LISTENS TO YOUR NEEDS AND RECOMMENDS PRODUCTS TO MEET THOSE NEEDS

Vendors should carefully listen to what you need and then recommend a solution based on products they have to meet those needs. Vendors that care about you as a customer will only recommend products or services that fit your needs and will not attempt to recommend a product just to make a sale.

4.7 VENDOR CAN SUPPLY TRAINERS TO DELIVER PROGRAMS

When you have a new program, it is best to have the vendor deliver the first few programs so you can learn how to present it. A training/leader's guide cannot give the trainer a feel for how to best present the material, so it is generally helpful to have the vendor deliver the program the way it is meant to be delivered.

4.8 PROGRAM HAS PURCHASE/LEASE OPTIONS

Training vendors offer a variety of options regarding purchase, credit for evaluation training, or rental. Such options can be advantageous to a training department with a tight budget, cash flow management considerations, or when there is insufficient justification for purchase. Some training vendors charge for previewing their programs while others do not. Training vendors are happy to discuss these options with you.

4.9 THE VENDOR WILL NOT NEED TO OVERLY RELY ON YOUR COMPANY FOR EXPERTISE

You will most likely need to provide subject matter expertise or assistance to the vendor. However, the vendor should have some skills and resources to recommend and implement solutions. If the vendor relies on you too much, ask yourself if you really need the vendor in the first place.

4.10 LICENSING ARRANGEMENTS ARE AVAILABLE

If you plan to use the product at multiple locations, licensing may be more advantageous than purchasing many hundreds of copies. Licensing allows you to use and reproduce the material rather than purchase additional copies. This is especially useful if you are planning to use the program on a broad basis. Be certain of your own company's copyright policy as well.

5 Vendor Technical Support

The type of support will depend upon which type of training you desire and what type of delivery system you will use. Questions to ask regarding technical support are listed below.

5.1 THE VENDOR HAS INSTRUCTOR-LED SUPPORT

- How many instructors do they have for this course, and what is their background?
- Do the instructors work for the vendor, or are they contracted for this training?
- In the future, will these instructors be available?
- Can the vendor customize the materials for your plant?
- If the material changes, will the vendor supply updates, and what is the cost?
- After the training is complete, will you own the rights to reproduce/provide the training to others in your plant?

5.2 THE VENDOR HAS SUPPORT FOR THEIR VIDEOS AND WORKBOOKS

- If the material changes, will the vendor supply updates, and what is the cost?
- Can you reproduce the materials or do you have to go back to the vendor for new workbooks? What is the cost?
- Do you have the right to make copies of the video?
- Can the vendor customize the video and/or workbook for your plant?

5.3 THE VENDOR HAS SUPPORT FOR THEIR CBT MATERIALS

- What are your system requirements to run CBT?
- Is the product discounted for multiple purchases?
- Is a reasonable site license agreement available?
- Will the vendor help with installation and is there a cost associated with this?
- Will the vendor supply automatic updates, and what is the cost?
- Is there an automatic recordkeeping process within the software?
- If the product is to be shown on your Internet or Intranet, do you have adequate memory on a server to allow multiple users on the system?
- Do you have to purchase run-time licenses?
- Do you have to purchase any software licenses to show the product?
- Can the vendor customize the program for your plant site?
- What is your system's performance using this product, i.e., adequate speed in bringing up screens?
- Will the company systems department support the product?

5.4 THE VENDOR HAS SUPPORT FOR THEIR DISTANCE LEARNING MATERIALS

- Is your plant site set up to utilize either satellite or Internet learning?
- What will be the cost to set up the hardware to provide this type of learning and will the vendor help in justification?

5.5 SUPPORT IS AVAILABLE ON DEMAND

5.5.1 Phone support available during times it is needed

- Is there a help desk available on a 24 hour basis?
- Is there a toll-free number, or is there a charge per call?
- Is the help desk available for technical questions or just user questions?

5.5.2 On-site support available if needed

- Can the vendor come to your site on demand to fix technical problems?
- Is there an extra fee for this service?

6 System Compatibility

6.1 THE PROGRAM CAN OPERATE OVER COMPANY LAN OR INTRANET

As programs that operate off a LAN or Intranet become more cost efficient, especially when made available over multiple sites, *it is important to know that the hardware will support the software*. While browsers will support nearly all software, sometimes band width constraints and server limitations prevent making programs available on a broad based network. It is best to check with a company's IS department prior to making a purchase.

6.2 SOFTWARE IS COMPATIBLE WITH OPERATING SYSTEM

As Windows operating systems change, make sure that the software runs on the operating system at the site. Not all software runs on the newest operating systems. In fact, software requirements will typically lag behind operating systems until a system becomes prevalent in the user population. Be especially careful if the operating system is more than two years behind the current version.

6.3 SYSTEM REQUIREMENTS HAVE BEEN REVIEWED WITH IS PERSONNEL

Before investigating software, get the system requirements ahead of time so you can eliminate software that will not operate on your system. This will also minimize your research time and allow you to focus only on software that you know will work.

6.4 VENDOR IS FAMILIAR WITH COMPANY'S COMPUTER SYSTEM

The vendor should be familiar with the company's computer system since they will most likely be called in to fix problems. A company's systems department will not be familiar with the software, so the vendor will be called upon to make all on-site fixes, if needed. To ensure a minimal amount of downtime, it is helpful if the vendor's technical support has worked in a familiar environment.

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