

# Vendor Selection Process Outline

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The following is a brief outline highlighting steps in our Vendor Selection Process.

## PHASE I: REQUIREMENTS GATHERING

- ❖ Meet with Hospital Executive Team
  - Identify major departments impacted by potential new information system
  - Conduct Executive Education session if required.
  - Set executive priorities for new system requirements
  - Select executive sponsor for selection process
  - Recommendations for individual team members (highly recommend keeping count below 10 with a least one representation from both nursing and physician ranks)
  - Set dates for project completion
  
- ❖ Meet with selected team members
  - Develop process plan with time tables, responsibilities and expectations
  - Set up meetings with individual departments for requirements gathering
  
- ❖ Meet with departments individually
  - Up to ten individuals from each department
  - Identify key requirements of each department using StrategEASE® process
  - Prioritize requirements with the Electronic StrategEASE® tool



- ❖ Team Develops RFP and Vendor List
  - Review all department requirements and priorities
  - Compare priorities to executive priorities
  - Review potential vendors (KLAS data base will be used for educational and comparison purposes as well as the HIMSS data base)
  - Develop RFP and send to selected vendors
  - Report progress to executive team

## **PHASE II: VENDOR RESPONSES, DEMONSTRATIONS AND INITIAL CUT**

- ❖ Review all Vendor responses
  - Receive all vendor responses and deliver to all team members
  - Members report on their area of responsibility
  - Set dates for Web based demonstrations or on-site demonstrations
  - Contact vendor references and have team members report on results
  - Identify capabilities with established department priorities
  - View vendor demonstrations
  - Make initial cut to three vendors
  - Report progress to executive team

## **PHASE III: VENDOR SITE VISITS AND SECOND CUT**

- ❖ Reference on-site visits
  - Schedule three team site visits to vendor references (including vendor HQ visit if possible)
  - Investigate vendor offerings in greater detail
  - Create report with team member recommendations
  - Make second cut to two vendors
  - Have final two vendors rework their pricing proposal
  - Invite both vendors to Hospital for several days of demonstrations to hospital staff
  - Report progress to executive team

## **PHASE IV: FINAL RECOMMENDATIONS AND CONTRACT NEGOTIATIONS**

- ❖ Final Selection
  - Selection team reports on vendor capabilities and recommendation for final vendor
  - Priorities are examined and matched to vendor capabilities in final recommendation
  - Receive selected vendor contracts two weeks prior to scheduled signing

- Negotiate additional savings before signing (*if possible, it is always better to negotiate in 4<sup>th</sup> quarter or at least near end of a business quarter due to vendor sales bonuses and recognition for end of year or end of quarter accomplishments*)

SAMPLE