

ASSESSMENT MANAGER™

Tool Evaluation & Selection Workshop

A PROGRAM OF ECPWEB.COM

Selecting the right tool begins with a thorough assessment of your organization's business and technical needs, continues with developing a short list of tools to evaluate and ends with vendor demonstrations and selection.

In this half day workshop, participants will explore ECP's proprietary methodology for evaluating asset repositories and discovery and software compliance tools through interactive discussion and team exercises.

We'll start by reviewing a case study and several published end user assessments. Using the case study as a point of reference, teams will complete a requirements worksheet and rank their organizational needs. Then we review our 14-point assessment criteria, and following a short break, apply the assessment model in a live demonstration. The demonstration will be conducted using a full-function, unbranded version of a proprietary tool. After the demonstration each team will offer a short presentation of its findings.

This is sure to be an informative, hands-on workshop, and you'll come away with assessment templates and criteria, worksheets and product information. Come prepared to listen, learn and share your perspective.

Please note: Suitable for beginning to advanced users, the focus of this workshop will be on developing a deeper understanding of the business value, features and functions of popular IT asset and software management tools. Technical considerations and pricing are not covered in detail.

Prerequisites: None

Experience Level:

LEVEL 1 - Introductory

LEVEL 2 - Assumes familiarity and some experience in the topic area

Who Should Attend

- Software asset managers
- Asset managers
- Service desk managers
- Process improvement managers
- IT business managers, financial managers and staff
- IT procurement and sourcing managers and staff
- Executives and staff who are involved with the tool evaluation process

Workshop Materials

Each attendee receives a copy of all session materials including:

- Navigating the Tools Landscape, Tools Manager Assessments and other ECP publications
- Assessment Criteria Worksheet
- Organizational Requirements Worksheet

Workshop Agenda

Part 1

1. Introductions and review of expectations
2. Agenda Items:
 - Review handouts, articles and requirements worksheet
 - Review team exercise
 - Review assessment criteria
 - Demonstration
 - Discussion and team presentation
3. Form work groups for exercises and assessment
4. Present and review Tools Manager article and case study to be used by the work groups when conducting the assessment
5. Review the Tools Manager end user assessments
 - How are the assessments conducted
 - What do the functional areas mean
 - What do the ratings mean
 - What do the comments mean
6. Review the organizational assessment and requirements worksheet
7. Work-group exercise
 - Complete the organizational worksheet
 - Develop a prioritized list of organizational needs and requirements
8. Review the assessment criteria
 - What do the criteria mean
 - How to assess each area
 - Recording your comments
9. Break

Part 2

10. Review the scenarios to be demonstrated
 - What makes for a better demonstration
 - Prioritized list of requirements worksheet
 - Create scenarios that demonstrate real-world requirements
 - Plan your agenda and stick to it
11. Demonstration
 - a. User interface (Web and Windows clients)
 - b. Reporting and analytics (Standard and enhanced)
 - c. Task flow (workflow processing and task automation)Other scenarios:
 - d. Purchase order
 - e. Software agreement
 - f. Software usage report
 - g. Receive data and exception report
 - h. Charge back
 - i. View under-utilized assets
 - j. Create a list of unidentified software
 - k. Create a procurement approval workflow
12. Work Group Presentation of Findings
 - What are your top five organizational needs and requirements?
 - Which scenarios are most important to you and why?
 - What did you want to see that you didn't?
 - Which scenarios address the organizational needs and functional criteria?
 - How did the product rate on the categories?
 - What did you like and what didn't you like?
 - Based on your assessment – would you recommend this product? Why or why not?