

# Guide to software demonstrations

## Vendor engagement 'code of conduct'

How you engage with vendors could have a significant impact on your final choice and the overall costs you incur. A code of conduct will help to reduce influence and bias.

- **Communications:** a single point of contact with vendors (and others) reduces communication difficulties and helps to preserve an objective focus.
- **Gifts:** Don't accept them.
- Establish, and follow, **rules of selection and implementation:** ensure that when you are asking questions of vendors that they respond within the timeframe you stipulated, and that the Schedule agreed to and documented in your project plan is adhered to.

## Vendor demonstration advice

### Before you start

The best way to compare software is to arrange demonstrations of them. Before you do, make sure that:

- You clearly know what your requirements are.
- You are in control. You have a clear idea of what you would like to see and that the demonstration happens at a time that suits you.

### Scenarios

The best way to compare products is to have a few pre-scripted 'scenarios' that you run through on each product.

For example:

- **Patient check-in:** what are the steps to register their attendance, notify the consulting clinician, check demographic information and record reason for visit?
  - Repeat the above for different types of patients, e.g. a new patient, a patient with chronic conditions, a patient on their 2nd or 3rd visit.
- **Acute visit for URI.**
- **Chronic disease management** for new and follow-up patients;
- **Routine visits** such as an annual check-up.

Your high priority requirement/s are a good basis for a scenario. Another is where your experience of an existing system has been unsatisfactory.

Study how these mock patients flow through the system, how the billing is handled, and how the data is entered and viewed by front desk, nurse, clinician, practice manager, etc.

Vendors may resist your scenarios. Of course, you should be taken through what they consider the product highlights, but a seemingly mundane scenario as the one above will be performed many times a day. As well as high priority processes, it is important that you are happy with high frequency ones because that is where inefficiencies could really impact negatively on the clinic.

### Types of demonstrations

There are a few types of demonstrations, each with its pros and cons. You probably should do more than one.

It is vital you keep your practice's workflow in mind when viewing a demonstration.

If you are struggling to differentiate between two products, do not hesitate to request a second running of the demonstration. Like watching a movie, a repeat viewing will always reveal things you missed on the first run.

- **Non-interactive video:** This requires the fewest resources from the practice, but it is also offers the least benefit. This type of video can give you clues into the complexity of the user-interface and a glimpse into the functionality. Keep in mind that the video was produced by the vendor to showcase the best of the product and what the vendor thinks is important. This type of demonstration is useful when your list of product contenders is long.
- **Interactive trial demo:** This type is where you actually interact with a version of the software in some way. It requires more time compared with non-interactive video. Your goal during the demonstration should be to gauge the ease of use. The questions you want answered are: Is the product intuitive? Is it easy and quick to perform repetitive tasks (e.g. writing a prescription)? Is it easy to find specific patient information? File an electronic document?
- **Vendor directed demo:** This will require more time than an interactive trial demo and you will need to schedule it with the vendor. Your goal during the demonstration should be to understand the functionality available in the system. (If you have not already had an interactive demo, you will need to answer those questions as well.) Don't forget your requirements. And bring any issues you uncovered during the interactive trial demo.
- **Live site demo:** This requires the most resources from the practice (because of the time, travel, and money involved), but offers the largest reward in terms of assessing a product.
  - To set up a live site demo, you first need to find peers like yourself who are using the product in their practice. You can ask the vendor to give you a list of similar clinics using their product in your region. By asking a vendor for a list, however, you accept the likelihood that these users are happy with their software, since it is in the vendor's best interest. You can mitigate this by doing two things: (1) Ask for a list of 5-10 users and (2) Briefly interview the users by telephone before scheduling a site visit. Asking for such a large list and interviewing users can help you find some who may have had a problem with the system. You want to ask questions about how they deal with negatives of the system and how well they can explain the functions of the system. This demonstration should build on the previous demonstrations. If you have the resources, doing more than one site visit for particular clinical software is beneficial.
  - Bear in mind that there will be differences in the way the clinic you are visiting is implementing the processes from the way you would in your own clinic.

### Watch for the "red flags"

Be wary of certain behaviours. Should any of the below exhibit themselves, it is your cue to find a polite way to extricate yourself from the conversation:

- Vendor rep is working in “sell mode” conducting one-sided conversations, discussing solutions before you have managed to describe your needs etc.
- Overuse of impenetrable technical jargon designed to impress or confuse. Vendors are infinitely more impressive if they talk in way that you understand.
- Beware *vapourware*. As a famous USA senator was famous for saying, “You’ve got to show me”. If you are being sold on upcoming features, be aware that if you can’t see it, it doesn’t exist and you have **no way** of knowing how likely its existence will be.

Look for vendors who can listen to you and demonstrate that they’ve understood, ask questions of you and are not afraid to change their pitch when needed to align with your situation.