

Sample Evaluation Process

Evaluation Phase	Responsibility	Target Date	Accept Y / N	Billable ?
Desired Go-Live Date	Prospect			
Initial Inquiry or Phone Interview	Joint			
Initial Office Meeting	Joint			
Evaluation Process & Ground Rules Agreement	Joint			
High Level Discovery (50,000 ' view of why you are evaluating systems)	Joint			
Department Level Discovery (500' view of challenges, opportunities, critical needs, impacts, future, IT integration)	Joint			
Summary of Findings	ICS Support			
Preliminary Investment Estimate	ICS Support			
15 Minute Meeting with CEO	Joint			
Determine Return On Investment	Prospect			
Determine Preliminary Success Criteria (what does it look like, how will it be measured)	Prospect			
Proof of Concept (software demonstration)	ICS Support			
Professional Services Plan Review	Joint			
Review License/Contract Agreements	Prospect			
Review Proposal (rough draft)	Joint			
Present Proposal for Approval	Joint			
Verify References	Prospect			
Execute Engagement Letter and Finalize Success Criteria	Client			
Schedule Project Launch	Joint			