

Scheduling Software Best Practices

TeleStaff
Scheduling and Notification Solutions

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To learn more about TeleStaff,
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Scheduling Solution Buyer's Guide

Best Practices to Follow When Evaluating Scheduling Solutions

1. Prioritize your solution requirements and know your business processes.

The best way to accomplish this is to create a project team comprised of personnel within areas of the organization who understand the operations and can review potential vendors and systems. Collectively, define your business processes, as well as technical aspects, and prioritize your requirements as mandatory, desirable or optional. Without these steps, you put your organization at risk when vendors later admit an inability to meet your needs at all or without extensive and costly customization.

2. Select a vendor with industry-specific experience and knowledge.

Industry-specific vendors will have the best track record in your market because they will have a portfolio of customers that they have configured, implemented, trained and supported. You'll want to avoid vendors that lack industry-specific knowledge because you'll end up becoming "the guinea pig" – spending a lot of time educating them on your industry and how it works. It is critical to select a vendor with experience and knowledge to guide you on best practices during this time.

3. Get a list of system features and verify they exist.

Verify the vendor's feature claims relating to system functionality. You want to ensure that the features being marketed really exist. A good place to start feature verification is during the vendor's demonstration. Features listed in the vendor's marketing literature or website should be easily demonstrated.

4. Ask for a guided demonstration.

To ensure a vendor can handle your needs, request a guided demo that is customized to your specifications. This is where knowing your business process is critical. Ask the vendor to show you step by step how a certain process of yours is accomplished within their system. Start with your most difficult or time-consuming processes. Compare and evaluate vendors by how easily they solve your business problems.

5. Evaluate each vendor's customer retention rate.

A high customer retention rate indicates that the vendor's products and services are meeting or exceeding the customer's expectations. High retention indicates that the vendor has a base of customers who pay for support and maintenance and has an ongoing interest in building and supporting software in your market. Be careful to differentiate between '# of customers' and 'retained customers'; retained customers continue to receive benefits from the solution worthy of annual maintenance fees. A large discrepancy between '# of customers' and 'retained customers' may indicate an inexpensive solution that's worth trying (because it requires little investment or commitment) but one that doesn't meet the ongoing needs of the organization.

6. Evaluate viability of the vendor organization.

The solution you choose will be an integrated part of your organization for years to come. Make sure the vendor you choose has a history of viability and demonstrated growth. The Public Safety industry is full of small companies formed by previously sworn staff members. While these companies may understand your business needs, you should evaluate whether they have the infrastructure and experience to manage the software development and support lifecycle. Are their resources consumed with making sales to stay afloat or can they survive economic downturns? Do they have a well documented software release and implementation methodology or does every software issue/enhancement and customer implementation pose a new and daunting challenge?

7. Check up on the vendor by contacting references.

All vendors maintain a list of customer references. A reference may not be able to tell you if the system will meet your needs – that is the function of a guided software demonstration conducted by the vendor and an analysis of your business processes. However, ask the customer how the product has met its expectations, about the implementation process, and technical support and upgrades. Sometimes, an on-site visit to a customer's organization is needed depending upon the scope and size of the project. A good vendor can help you to arrange this in advance.

8. Look for a solution that matches the size of your organization.

The vendor you select should have a portfolio of customers that are similar to your organization in size and possible system use. Small and large organizations have unique scheduling environments that, at times, are equally complex but in different ways. Aim to select a vendor that has implemented a wide and diverse number of organizations. This is the vendor that "has seen it all" and best suited for your organization.

9. Make sure the solution can integrate with third-party applications.

Interfacing capabilities eliminate redundant data entry, reduce errors, deliver information faster and improve communication across all organizational levels. A good vendor will maintain a list of systems their solution links to, as well as a list of customers who interface to these systems. Ask your prospective vendor for these lists.

10. Evaluate the vendor's customer support capabilities.

Not every vendor will offer the same level of customer support. Find out how you will be supported and make sure it is through a variety of accessible, high-quality methods. Phone, Internet (self-service portal), e-mail and access to a knowledgebase is the variety you'll want. Be sure to find out if the vendor offers 24/7/365 support.

11. Find out about the return on investment.

Return on investment (ROI) is a metric for evaluating the efficiency of an investment. There is no one "right" way to calculate an ROI, but determining one can be accomplished fairly easily especially if you have a solid understanding of your business processes and what you want to achieve in using a new system. An ROI will show how a scheduling solution will help your organization save time or money – or even both, and your manager may want you to provide one. The best way to approach ROI is to calculate the current cost of tasks you plan to automate. Then, estimate the cost of the tasks under the new proposed system. These are referred to as "hard benefits." Also remember to include "soft benefits" in your ROI such as better communications faster, centralization of scheduling data, and improved employee morale. A good vendor will help you create an ROI if needed.

Scheduling Software
Vendor Checklist

**My Project Team for
 Vendor Selection**

Name _____

Department/Area _____

Name _____

Department/Area _____

Name _____

Department/Area _____

Name _____

Department/Area _____



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Questions	TeleStaff by PDSI	Vendor 1	Vendor 2
Do you have industry-specific knowledge?	TeleStaff is developed for the Public Safety industry and is used by more than 500 organizations throughout North America.		
Can you demonstrate each one of your system features?	Yes. Every TeleStaff feature really exists and can be demonstrated.		
Can you create a guided demonstration for me?	Yes. Provide the TeleStaff Sales Team with scenarios in your current processes that are problems, and let them show you how TeleStaff solves them.		
What is your customer retention rate?	PDSI's customer retention rate for TeleStaff is more than 90%.		
How viable is your business?	PDSI has been in business for 20 years and develops and supports three workforce scheduling solutions for the public safety, health-care, hospitality and retail markets.		
Do you have references I can call?	Yes.		
Do you have customers similar to my organization?	TeleStaff is used by over 500 public safety organizations across North America ranging in various sizes.		
Can your system interface with 3rd party applications?	Yes. TeleStaff interfaces to CAD, RMS, HR and Payroll.		
What are your customer-support capabilities?	TeleStaff offers customer support by phone, Internet (self-service portal), e-mail and provides access to a knowledgebase. 24/7/365 support is offered as well.		
What is the return on investment on your product?	Most customers see a return on investment in less than 12 months.		