

## Product Evaluation Report and Tool Kit

Maximising trial periods to make and support purchase decisions

A FreePint FUMSI report: Find, Use, Manage & Share



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## About This Report

The Product Evaluation Report and Tool Kit was jointly authored by Free Pint Limited staff and outside contributors with a range of experiences in product evaluation, needs assessment, project management and reporting.

The underlying methodology is based on the work of Pam Foster, editor of VIP (<http://www.vivaVIP.com/>), an information professional and journalist with over 20 years of experience reviewing and evaluating products. Pam can be reached at [pam.foster@vivavip.com](mailto:pam.foster@vivavip.com).

The case study included in its entirety in Appendix 3 and excerpted throughout the report is used with permission of its author, Megan Roberts. An article summarising her research was published in eLucidate, the membership magazine of UKeiG. For further information, please visit <http://www.ukeig.org.uk>.

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## Introduction

Trials are a great way to become familiar with products, but they can be used more strategically to make better purchase decisions. Treat every trial like a research project, and you have a powerful mechanism for decision-making.

Free trials are not really free: If you've ever signed up for a trial and barely touched the product during the trial period because you didn't have time, you know that trials cost time. An effective product trial is an investment, and it benefits from the same planning, implementation and outcome measurement as any other project. This FUMSI report is designed to help you maximise your investment in product evaluations, whether for new products or those already deployed within your organisation, determine appropriate ROI, document results and follow through with decisions.

This report is built on two foundational components: a methodology and a case study. The methodology has been adapted from the approach used by Pam Foster, editor of VIP (<http://www.vivaVIP.com/>), Free Pint Limited's monthly magazine of news analysis and product reviews for the premium content industry. Pam has been conducting in-depth product reviews for over 20 years, and her in-depth protocol for plumbing the depths of product features and benefits has assisted countless decision-makers. But because Pam does not always approach a product 'test drive' from the same perspective as a user, we also incorporated suggestions directly from information officers and managers as to how they approach product evaluation.

*"We use the case study, which appears throughout the report in sidebar format, to demonstrate each step of the methodology, and show an information professional in action as she applies the concepts to the needs and priorities of her particular situation."*

Alongside the methodology is the case study, which is adapted from material created by Megan Roberts, an information professional who conducted an in-depth, six-week comparative trial of news services from Factiva, LexisNexis and Thomson Business Intelligence in 2006. Megan's work involved a rigorous comparison of her organisation's existing vendor alongside two other vendors, across a range of review criteria. We use the case study, which appears throughout the report in sidebar format, to demonstrate each step of the methodology, and to show an information professional in action as she applies the concepts to the needs and priorities of her particular situation.

Finally, we provide you with a complete product evaluation Tool Kit, which you can use and adapt to apply a documented protocol to almost any evaluation, from a relatively brief afternoon of putting a product through its paces through the kind of multi-level, lengthy project documented through the case study.

There are great products out there to suit almost any business need. Your time is valuable, and the investment of your time to investigate those products can be extremely worthwhile. This evaluation guide and tool kit will help you get the most out of every trial.

## Use this report

### *Information managers:*

- Manage entire process of conducting product trials
- Generate buy-in for both the trial process and the adoption of products or tools
- Document and share results of product trials for internal communication, purchase support and contract negotiations

### *End users:*

- Respond to needs assessment queries
- Add components to evaluation tools based on unique needs
- Participate in trials and use evaluation protocol for *ad hoc* testing

## ✓ Tool Kit - Activity 4: Project Calendar and Tasks

If you leave your free trial time to 'whenever we get to it,' the trial will expire before you've had time to do the product justice.

**Tip:** Need more time? Most vendors will gladly extend a free trial period, or at least provide you with discounted access for an extended period, if you demonstrate the seriousness of your investigation of the product. Show the vendor your evaluation plan and explain why you need more/longer access. If the vendor will not comply with a reasonable request, seek another vendor.

It's important to schedule evaluations to align with contract renewals, budget cycles and other deadlines. Give yourself enough time to conduct thorough evaluations – including reporting, recommendations and approval times – prior to such deadlines. The steps you want to include in your project calendar and task list include, at minimum:

- Testing
- Documentation
- Validation
- Reporting

You may also need to include time for focus groups, multiple layers of approval, vendor negotiations, work cycles and other factors.

To create your calendar, start from your desired completion date and work backwards to schedule the steps that will get you there.

**Example:** A manager needs to complete a product evaluation, make a purchase recommendation, negotiate and sign the service contract in time for a 1 January budget implementation.

Date	Requirement	Notes
1 January	New contract must be approved and signed to coincide with budget cycle	Last year's contract took 3 weeks to negotiate
3 December	Enter into contract negotiation	Allow for one week of delay due to holidays
25 November	Present recommended solution to management team	Allows some additional time prior to contract negotiation to respond to any concerns or objections
20 November	Submit evaluation report	Provides time for management team to review prior to presentation
10 November	Trial period ends; begin reporting process	Reserve time to conduct thorough analysis and report
10 October	Begin trial period	Reserve specific project time each day to devote to evaluation
8 October	Complete development to data capture tools and initial testing	Share drafts with stakeholders for comment prior to start of trial
1 October	Complete needs assessment	Circulate results with those who participated to gather any final insights or suggestions on needs
15 September	Complete focus groups	Reserve time for documenting and analysing results
10 September	Complete survey of user groups and stakeholders	Use results to define areas for deeper exploration during focus groups
1 September	Identify comparative products for review and define evaluation criteria	Project kick-off

## FreePint FUMSI Report -- Product Evaluation Report and Tool Kit



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Product evaluations can be extremely time-consuming, making even free trials a potentially costly project. Furthermore, it's essential to understand prior to the trial what a user's or organisation's needs are, vis-à-vis that product. Despite the fact that a systematic approach to trialling products is a valuable professional skill, few resources exist to help define, implement and report on product evaluations.

This report fills that gap by providing a flexible framework for planning and conducting effective product evaluations. By laying out a step-by-step approach, the report helps users understand the purpose of their evaluations, understand their organisational needs, plan a methodology, conduct and report on product trials.

Contributors to the report include Pam Foster, editor of VIP <http://www.vivaVIP.com/>, based on her years of experience conducting product reviews for subscribers.

The included tool kit of 5 hands-on worksheets and activities helps users translate the information into an actionable plan.

View a sample from this report, including table of contents, introduction and one tool kit activity:  
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