

# 4 STEPS TO CHOOSING THE RIGHT CONTENT SERVICES PLATFORM VENDOR



Finding the right content services provider doesn't have to be complicated. Follow this step-by-step methodology to choose the vendor that can best meet your organization's needs.

## 1 THE 2021 GARTNER® MAGIC QUADRANT™ FOR CONTENT SERVICES PLATFORMS

This report is designed to help organizations looking for a content services vendor. Starting your search here gives you an unbiased overview of vendor strengths and weaknesses.

Determining what's important to you is key. Some go straight for the vendors in the "leadership" quadrant and start there. Others have very specific requirements in mind — such as a cloud offering — and look through the descriptions to identify vendors who have a great story to tell in that area. When evaluating vendors, consider the following traits:

- **Long-term viability within your market and organization**
- **Investments in the cloud as a deployment option**
- **Proven track record of addressing your solution requirements**

This first step should help you narrow your choices down to three to six vendors.

## 2 REQUEST FOR PROPOSAL

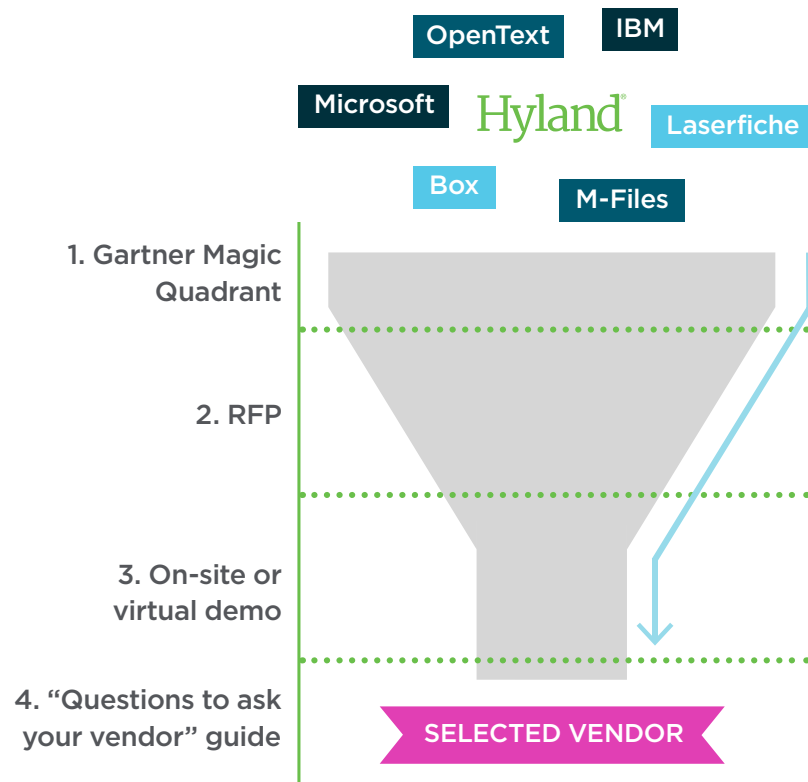
You'll learn a lot about the vendors from the replies you get. Some will "de-select" themselves from your list by either stating they are not a fit for your requirements, or by not meeting your deadlines.

When you do get a reply to your RFP, here are a few things you should look for:

- **New insights into the business challenges you face**
- **Ability to easily configure, maintain and grow the solution in-house**
- **Evidence of vendor stability and experience**

Now that you've narrowed down your choices further, the real fun begins. Invite two or three vendors on-site or virtually so you can evaluate their software and expertise.

Hyland



### 3 ON-SITE OR VIRTUAL DEMO

An on-site or virtual demo will help you determine if a vendor can meet your functional requirements. Look beyond the personalities of the people in the room, since the staff you'll be working with for implementation, training and maintenance will likely be different. Ask questions that will give you an idea of what it will be like to work with that vendor in the long run. A good vendor will refer you to other customers in your industry to talk to – both long-term and newer customers.

Other things to look for in the demo:

- Did the vendor listen to your questions, concerns and feedback?
- Was the demonstration tailored to your requirements?
- Was the vendor able to demonstrate industry-specific expertise?
- Did the vendor provide you with a sense of confidence in its training capabilities and implementation methodology?

After answering these questions, it's extremely likely that you'll boil down your final selection to at least two vendors that meet your functional requirements and can provide you with good customer references.

### 4 "QUESTIONS TO ASK YOUR VENDOR" GUIDE

While a vendor might meet your immediate needs today, you need to consider how confident you feel about its ability to meet your future needs. This is the time to identify not just WHAT the product can do, but HOW it does it. That will make a big difference in determining how you will customize and tailor the product beyond the initial licensing, as well as the overall cost of the solution.

To help determine the right questions to ask, check out: [Questions to ask your vendor.](#)

Learn more at [Hyland.com](https://www.hyland.com)

