DIGITAL TRANSFORMATION PARTNER EVALUATION CHECKLIST

When evaluating prospective Digital Transformation partners, you should ask a variety of questions to determine if they understand and can align to your organizations needs and goals.

Utilize case studies and references to analyze how they work with their clients, their delivery process, costs, time to market, etc., which can help form an overall review. But, then take a deep dive into how their experience, processes and other strategic aspects fair in the various metrics your organization needs.

Emtec's experts have compiled this quick checklist of items all organizations should consider during the **Digital Transformation** partner selection process.

EXPERIENCE

1 Expertise in the latest digital transformation technologies

What kind of experience does the vendor have with various modern or emerging technologies? Your partner of choice should display capabilities in various modern technologies, including cloud, Big Data, Cognitive Services, IoT, Robotic Process Automation (RPA), and others associated with your specific initiative or industry.

2 A right-sized, tech-savvy team

Does the partner have certified resources in the technologies the project needs? A partner must have the right size staff to work with your IT team as well as various end user groups and executive staff. The number and types of technical certifications it has also tells you how tech-savvy the partner team is.

3 Ability to ask the right questions to gather functional requirements vs. just technical

Does the partner have complete understanding of your project? Your organization should choose a partner that understands the functionality of your systems and processes and has the right approach to addressing these along with an understating of your technical requirements.

4 Holistic set of services including architecture and design, implementation and post-go-live support

Can the partner address all your requirements? Your organization should seek a vendor that offers services that run the gamut of the lifecycle of your project. This ensures that the partner has complete understanding of your business goals and will be involved during all stages of the project.

5 Detailed experience with system security

How experienced is the partner with ensuring security at all layers of the application? While you may get built-in security mechanisms if you are hosting the application on the cloud, the security of the application being developed has to be ensured by the partner. Security considerations should be one of the most important priorities of the partner.

6 Industry background

Does the partner have any clients from your industry? Your vendor partner of choice must have experience in your industry and have the acumen to fully understand related regulations, challenges and processes.

PROCESSES

1 **Highly mature agile practice**

How many projects has the partner executed using agile methodologies? The vendor should have expertise working with trending technologies and processes as well as the evolving nuances of your company. Agile expertise tends to improve with each project and hence it's necessary for the partner to have executed a sizable number of projects.

2 **Clear articulation of details related to network, infrastructure and compliances**

Does the partner have processes in place to accurately communicate the details about its network, infrastructure and compliances? The partner should provide complete information about its infrastructure setup and adherence to other statutory compliances. In case the partner doesn't already have some of these compliances, they should be willing to commit to achieving them in a defined time period.

3 **Willingness to revamp execution methodologies as per your needs**

Does the partner offer the flexibility and ability to alter execution methodologies if needed? If a project implementation isn't going as well as your organization had hoped, your partner should be willing to alter execution methodologies to help achieve success.

4 **Clear and transparent documentation**

Does the partner follow documentation best practices? As part of the partner's project management and execution processes, you should get detailed documentation during every phase of the project. Its documentation should cover (but not be limited to) requirement analysis, defect tracking and analysis, test cases, test plans, change management processes, etc.

5 **Proven ability to integrate seamlessly with your ecosystem**

How do the partner's teams align with the teams of their current clients? The structure and various roles within partner teams should complement yours. And partner staff should be able to mesh well with your company and team values, and processes.

6 **Flexible engagement models**

Is the partner pushing its engagement models on you? Is it willing to tweak the engagement model based on your current and long-term requirements? A vendor partner should offer customized service agreements that meet your company's specific goals and needs.

STRATEGIC

1 **Proximity of service provider's team to your key locations**

Where would the partner team be located geographically? If your project requires on-site configurations or training, you need to ensure your vendor can provide staff at your various locations. If the partner doesn't have a team in close proximity to your location, it should be willing to send key project resources to your location as needed.

2 **Clearly defined escalation matrix**

Does the partner have a clear escalation matrix it can share with you? Your organization must ensure the partner will be responsive when you need assistance. Whenever a need to speak with the partner's senior management arises, it should have such a matrix already in place to guide you through the escalation levels. This becomes extremely critical in cases where the project scope changes are considerable or there are issues with the project execution or delivery.

3 **Ability to scale the engagement, both in terms of technology and resources**

Can your partner supply the needed staff and infrastructure for the scope of your project? The partner needs to have a sufficient number of hands-on technical resources to scale up in case the project requires additional technical or resource capacity. Project scope changes are commonplace, so, it's imperative that the partner has some buffer capacity.

4 **Proven ability to lead innovation with thought leadership**

Is there evidence, either on their website or via third-party analyst reports, that the partner employs forward-thinking methodologies and strategies? Check the vendor's website for blogs, white papers, e-books or other collateral to determine if their executives actively discuss plans or areas of focus. A partner should show awareness of common industry pain points or challenges and best practices or expertise on how they can be handled.

This checklist was designed to give organizations a comprehensive guide to questions they should ask when selecting a digital transformation partner.

Emtec's experts can provide the expertise and methodologies to help your organization stay true to your goals and culture during the entire digital transformation. Contact us today to find out more.