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JCA's Ticketing Systems Selection Guide

*How JCA Can Help You Identify and Implement
the Best Possible Ticketing System for You*

A White Paper Prepared by:

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Step 1 – Project Preparation (RFP)

1. Create a Project Team

Include staff members from all affected areas of the organization. Make sure that each member of the project team has the authority to speak for their department. Set regular project meetings to review and discuss issues as the process unfolds.

2. Be Sure to Have Invested Management Support

Obtaining the full support of senior management for the project is fundamental to its success. Old procedures must be unlearned and new procedures implemented. This takes a significant amount of time, energy and commitment on the part of staff members. A resistant staff can paralyze a project. A proactive and invested Management is the best defense against this.

3. Earn Staff "Buy-In"

Convincing staff of the project's merit will facilitate a more effective transition. Generate enthusiasm by emphasizing the merits of the new system. Presumably your organization is transitioning to a new system because it offers functionality not available from your current system. Show staff how the new functionality will help them do a better job.

Also take into account that a new system can intimidate staff. Anything "new" and "different" will raise staff member doubts about their ability to adjust. Do not forget to emphasize the company's dedication to training the employees thoroughly. There will be no staff left behind!

4. Allocate Sufficient Funds

The budget for a new system must include more than just a license fee for the software. Make sure to plan for costs associated with required hardware, conversion and custom reports. Make sure you allocate enough money to finish the project. Include some room for "incidentals" in the budget. The worst case scenario is to be stuck in the middle of a system conversion without the funds to finish the project.

5. Allocate Sufficient Staff Time

A system selection, conversion and implementation take a lot of time, particularly for the staff on the Project Management Team. To ensure success, these individuals will need to delegate parts of their traditional responsibilities to others for the duration of the project.

A significant conversion pitfall is putting too much burden on your project team without alleviating other job duties. These individuals are crucial to a successful selection and implementation. Their enthusiasm is paramount. Do not make the selection, conversion and implementation process an added burden on them. Instead, recognize it as a pivotal part of their role.

Over the course of the project, the entire staff will face additional work. A new system takes training, after which there is an adjustment period. Make sure management understands this. A confident enthusiastic staff will adjust much faster and with less resistance.

6. Assess Your Organization's Project Goals

- *What do you hope to achieve with the selection and implementation of a new system?*
- *What current practices must be preserved?*
- *Must the system have integrated fundraising functionality?*
- *Must the system integrate with other systems within your organization?*



7. Establish a Realistic Timeline; Be Aware of Demands and Conflicts

Ideally, a system selection, conversion and implementation affects daily operations as little as possible. This is most feasible if you do not schedule the conversion and implementation to coincide with your busiest season for ticket sales. Instead, schedule the project for a relatively quiet time in your organization's operations. Many Organizations do system projects in the summer months when donors are absent and other tasks are less burdensome.

8. Do Not Hesitate to Engage Outside Help

An organization undergoes a new system implementation infrequently. At the same time, it requires dedicated and knowledgeable project management as well as a significant commitment of time from existing staff, many of whom have little extra time to give. Many organizations are not in a position to provide dedicated project management or to reassign critical staff members to a selection, conversion and implementation project. Consultants can provide leadership and best practice advice while minimally disrupting the day-to-day business of key staff. They will bring specific experience that may not exist within your organization. Experienced management will make a project run smoother and be able to troubleshoot potential problems more efficiently.

Step 2 - Request for Proposal (RFP)

1. Know What You Need, What You Would Miss, and What You Will Not Miss

Every system has strengths and weaknesses. Review your current data structure and business processes to identify aspects that have proved useful. Do not be afraid to embrace what you like simply because you assume there has to be something better.

Identify current processes and data structures that do not work. Look for processes that require duplication as well as anything that involving significant manual manipulation outside the system. Constantly exporting to Microsoft Excel and massaging the data likely means that your current system is not meeting your business needs.

Do not be married to current business practices, "because its always been done this way." Try to think about the best way to achieve a task and do not be afraid to ask potential vendors to respond.

2. Create a Detailed Checklist of Requirements

Having identified what you find valuable and what you do not, the next step is to create a checklist of the functionality you will require going forward. Segment your checklist either by function or by department and be as specific as possible.

For example, do not simply ask if the potential system can sell a ticket. Break this transaction into its parts. Can you reserve a ticket to an account without payment? Can you apply multiple payments to a ticket? Etc. (This is further elaborated upon under **RFP: Structure**)

3. Determine Appropriate Vendors

There are several comprehensive software vendor resources available online. A few are listed below.

- International Ticketing Association
- American Association of Museums
- Museum Computer Network



- Association of Science & Technology Centers
- American Zoo Association
- International Association of Amusement Parks and Attractions

4. Define Basic Requirements

Determine the requirements for specifying vendors who will receive the RFP, but do not be completely inflexible. Ultimately, any vendor lacking important features will be eliminated later in the process. Some benchmarks to use when deciding your list include:

- Vendor financial history
- Vendor support policies
- Training programs
- Standard marketing literature
- Documentation, sample reports, etc.
- References
- Costs

Step 3 - RFP: Structure

1. Introduction

In the introduction to your RFP, articulate your organization's background and mission. Designate project responsibilities with a particular focus on what you expect from your vendor. Identify issues that make your organization unique. Give an overview of your organizations preferred timeline for the project. Finally, provide the contact information for the preliminary project manager(s).

2. Requirements Overview

Review your strategic overview and define what you are trying to accomplish. Explain why your organization is undertaking a system conversion so that the vendor understands your motivation. List your operational goals.

Outline the various functional areas that touch the ticketing operations and will be affected by the conversion. Explain how the information will need to be shared amongst different departments as well as how the new system will expected to affect operations in each of these areas.

Most importantly: Give vendors enough information to fully understand your business.

3. Evaluation Criteria

This section outlines how you will evaluate the RFP responses. It should define for vendors what factors are most important to you and what they should focus on in their submission. These include, but are not limited to:

- Meeting software and system requirements
- Proposed initial and recurring costs
- Vendor qualifications, third party references, and implementation history
- Demonstrated ability to provide continued product support
- Procedural documentation and end-user training
- The overall quality of the RFP submission, including the relationship with the vendor and the perceived diligence of the vendor



4. Vendor Submission Requirements

Whereas the Evaluation Criteria gives an overview of the things that will be considered, in the Submission Requirements, you should list specific documents required for consideration, including:

- The Functionality Checklist
- A description of the vendor's history
- Documentation of vendor finances along with an audited financial statement
- A description of the vendor's software support organization and methodology
- The vendor's software training approach along with sample training curricula
- Standard marketing literature
- A description of the security features incorporated in the system
- A description of the product's current ability to function effectively over the public Internet or a private Intranet
- Recommended hardware configurations and costs
- A sample of the user guide/user documentation
- A sample of the technical documentation
- A sample of the training materials
- A sample of the major reports and listings

5. Requirements Checklist

Present the vendor a checklist of desired system attributes expected to be included in any proposed solution. The vendor's proposal should respond to each individual requirement. When completing the RFP, each column should be marked with a Y (Yes), No (No) or M (Modification Necessary), which specifies the proposed system's ability to perform the particular function described. An additional column should be provided for any relevant comments the vendor may wish to make addressing the topic.

The checklist should include systems requirements, departmental/functional requirements as well as any unique requirements that may be relevant, such as interfacing issues.

When creating the checklist, assign a relative importance to each function. Determine which items are must haves and which items are on the 'wish list'. This information is not meant to be shared with vendors, but it serves as a guide for reviewing vendor submissions.

Example of Detailed Checklist

7.1 DESIGN AND DELIVERY REQUIREMENTS			
	Requirement	Y/N/M	Comment
7.1.1	Capable of operating in a multi-user environment with record-locking techniques that protect records from simultaneous update, yet allow simultaneous inquiry.		
7.1.2	Able to satisfactorily support 40 concurrent users, with up to 25 running front desk operations and 3 running mailing lists, queries and reports.		
7.1.3	Support database size up to 200,000 customer/member accounts for future growth. Specify size and growth limits as well as performance issues related to size.		



6. Work Product

A final step is to create a list of "Work Product" that would be relevant to your system. Ask to see examples of each of these as produced by the proposed system. Such products could include:

- Tickets
- Receipts
- Cash-out reports
- Financial reports
- Sales Reports
- Constituent Reports
- Interface files/formats

Step 4 - System Selection

1. Evaluate Responses to RFP

An integral step is to determine who will evaluate the RFPs. Depending on the size of your initial project team, this could be the same group of people. But it is ideal if this group is relatively small, as each department should have been consulted prior to creating the RFP and the RFP does a lot of the winnowing for you. Furthermore, evaluating RFPs should be as objective as possible and this is ensured by the next step, the Evaluation Grid.

2. Create an Evaluation Grid Excluding Costs.

Create a grid to evaluate the submissions by the vendor. The grid will list all items required in the Vendor Submission Requirements. Each item will have an assigned importance. Typically, the responses on the Detailed Functionality Checklist are most important. Grade each submission based on the vendors responses to the items that were deemed must haves. See how many wish list items are met.

Sample Evaluation Grid

7.1 OFF-SITE TICKETING			
Requirement		Y/N/M	Comment
7.1.1	Support ticket consignments to other establishments such as hotels. Describe how tickets are tracked and redeemed.		
7.1.2	Support real-time ticketing over the Internet, accessing live ticket inventory. Specify fees, if any.		
7.1.3	Able to intelligently offer "up sell" opportunities on general admission sales.		
7.1.4	Support a single patron account for an individual or group's sales made regardless of location/method (online, phone, kiosk or on-site).		
7.1.5	Able to restrict certain ticket types to (or from) Internet sales.		

By the end of the RFP evaluation, you want to have narrowed to the field to no more than four vendors selected to participate in the Vendor Demonstrations.



3. Vendor Demonstrations

Vendor demonstrations should be scheduled onsite or at a convenient location off-site. If at all possible, do not settle for a canned demo. A canned demo will not allow for deviation or questions, can be too easily tailored to promote the strengths of a software and will not allow you, the consumer, to dictate the subjects covered. Instead, create a unique standardized demo script for all vendors to follow. The agenda should be drawn from the Detailed Requirements checklist submitted with the RFP. Make sure to note concerns about the vendors submission ahead of time and to ask about these concerns during the demonstration. During the demos, ensure vendors stay on point and on time.

Invite only a select group of individuals to attend and assemble the group for debriefing the demonstrations as soon as possible after the initial round of vendor demos. Complete the evaluation grid as created from the RFP.

Schedule a second round with two finalists and allocate a full day for each demo. Refine the demo to concentrate on areas of concern and be sure to include any issues of "gap-fit", i.e. identifying gaps in the current processes and the capabilities of the systems being reviewed and examining how these might be addressed.

4. Further Due Diligence

Do not conclude the system evaluation once satisfied with the end product. Examine the entire structure of the vendor.

- Look for third-party opinions. Check references, scrutinize user group communities, monitor web list-serves
- Make onsite visits to other end-users as well as a vendor site visit
- Achieve consensus and unreserved buy-in from within the selection team
- Do NOT eliminate the runner-up until a contract with the winner is imminent
- Inform and debrief the vendors who were not selected
- Use the contract negotiations for leverage to get product enhancements

5. Get ready for implementation!