How to choose the right ECM vendor for you

With hundreds of enterprise content management (ECM) vendors to choose from, picking the right one can feel overwhelming. Following this step-by-step methodology will help you quickly narrow down your choices to only those best-suited to meet your organization's specific needs.

1 The Gartner Magic Quadrant for Enterprise Content Management

We believe starting your search with the Gartner Magic Quadrant provides an excellent overview of vendors and can help you begin highlighting those that might be a good fit for your organization.

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:

- The ability to offer a range of content and information management capabilities on a single platform
- Long-term viability within your market and organization
- Investments in the cloud as a deployment option
- Proven track record addressing your solution requirements

These traits should help you narrow your choices down to three to six vendors before moving on to the next step.

2 Request for Proposal (RFP)

The responses you get to your RFP will be detailed and take a long time to digest, so getting a response from a few key vendors is the ideal approach.

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, 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 to two or three vendors, the real fun begins. These vendors will come on-site and try to woo you with their software and expertise.

3 On-site Demo

Of course, your goal is to find out if the vendors can meet your functional requirements. Whether or not they can will become evident in their demo.

Look beyond the personalities of the people in the room. Should you choose that vendor, the staff you'll be working with for implementation, training and maintenance will likely be different. Instead, try to get an idea of what it will be like to work with that vendor in the long run. Ask for a selection of other customers in your industry to talk to – both long-term and newer customers.
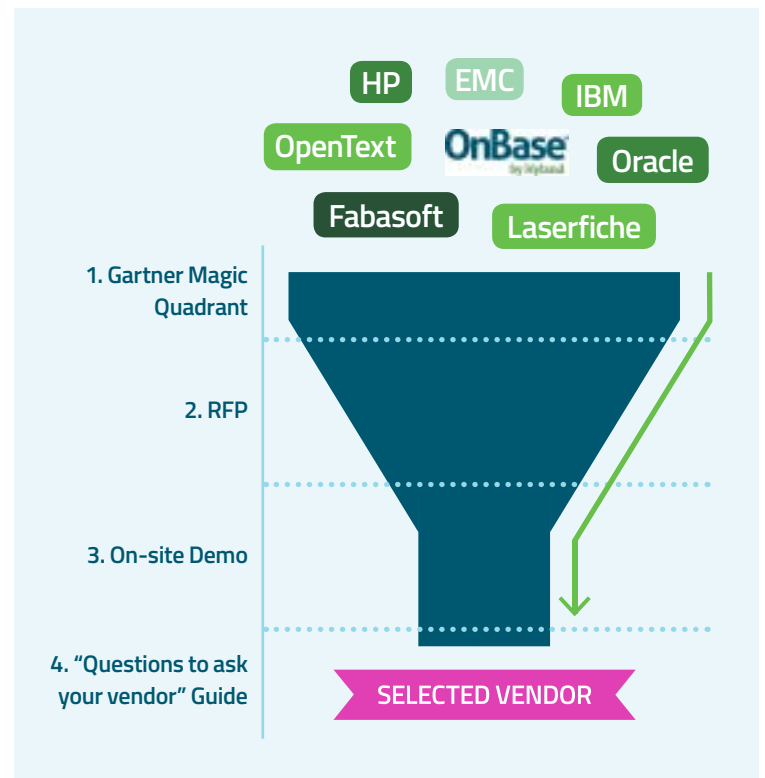
Things to look for in the demo:

- Did the vendor listen? Was the demonstration tailored to your requirements?
- Was the vendor able to provide 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

Now that you have all of this information, you're probably wondering what to do next.

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. It's also time to really 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.