



DIGITAL DATA PRESERVATION PLATFORM PROCUREMENT IN 3 SIMPLE STEPS

Formpipe's Digital Preservation Lead, Ben Saxton, is pleased to present a 3-point guide to procuring a digital data preservation platform.

There would need to be internal buy-in to ensure the project has resource and financial backing. It would also require support from senior management, practitioners and other departments, especially IT.

Knowing where to start can be a challenge and with that in mind, the Data Preservation Coalition (DPC) can offer great support in building a business case and advocacy within your organisation.

www.dpconline.org/knowledge-base/advocacy



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01 DRIVING FACTOR

All projects are born with an end deliverable in mind, this can be a positive aim or an action to correct an underperforming aspect of your business. We think of this aim as the driving force behind your project. Understanding, identifying and embracing your key driving factor is vital to a successful project.

Developing a User Requirement Specification (URS) is an important factor to any successful project and should be introduced at the procurement stage. However, do not allow the URS to become a barrier to starting or progressing your project. Focus on why you are doing the project in the first place and allow the URS to support that. Organisations like the DPC can provide an example of a URS that you can use to start your project and learn from the work that has previously been done by others. There are a large number of generic questions that will be asked for any software procurement or of any external supplier that you can simply copy and allow your own resource to be focussed on adding questions that benefit the individual aspects of your organisation.

Being clear and well-defined about your driving factor will enable you to communicate the reason behind the project to internal stakeholders and external parties such as vendors, consultants and customers. It will help you obtain agreement or sponsorship of your project and more importantly keep the project on track to time and budget.

Keep the driving factor in mind and use it as a judge of success; do not allow less important factors to threaten it.

02 CULTURE

Select a vendor based on cultural and behavioural compatibility. As mentioned above, your URS will lead you and your questioning for potential vendors but being able to then put your plans into practice and work in the real world are more important than any paper exercise.

Any software system procured should be a long-term relationship, although preservation adds further longevity to a relationship. You should question whether you feel comfortable working with the vendor, whether you trust their guidance and if it is an organisation that will grow with you. The people who form the vendor's delivery team need to share your project's goals and your commitment to making it work, knowing when you need them to follow your lead and when you would welcome their input.

It is advantageous for two like-minded organisations to collaborate and align together as it will lead to a smoother and better performing relationship. The URS and technical review still has a role to play but it is important to find an organisation that has a good cultural and behavioural match. Following on from point one, does the vendor believe in meeting your driving factor and do they share your goal?

03 FUTURE-PROOFED

Ensure you ask the correct questions about the product and the vendor when considering the future in three, five and ten years time. A product roadmap is one thing, but may be too short-term so what underpins the vendor itself? What is their view on adopting new technology and how do they introduce that to product and clients?

Current examples of this can be seen around the transition from On Prem to cloud or advancements in automated, machine-led testing and data assessment. New future trends need to be assessed, considered, communicated and then either dismissed or integrated into the product. Emerging technologies will determine frameworks and how technical and development teams need to be structured to allow career progression.

Existing clients will be able to give a reference on products and approach but it is always wise to get an idea of track record of future-proofing. Make sure this is part of the URS or documented alongside it.



BONUS POINT

One additional piece of advice to help you with your procurement journey is don't be afraid to be different! You don't necessarily have to follow the crowd and do what has been done before.

With software procurement, many organisations will look to their peers and implement the systems that they are using. This can offer reassurance or security in your decision but can also mean missing out on product functionality or obtaining the best commercial deal.

This is true for any software but especially in digital preservation where the sector is still in its infancy. Trusting your own judgement and opinion on vendors and product will bring more rewards than risk.

Showing faith in a vendor and the product will pay dividends for brave decisions as you helped shape the lead product development in the long-term. It also means you have the opportunity to be an early adopter and become a leading voice in the product life-cycle.

Don't be put off your digital preservation project by the procurement journey. This has been designed to help you identify the best possible product and partner organisation for your requirements. We hope this guide will help you stay on track and focus on the important elements during the buying process. If you would like further information or to discuss your project in further detail, please contact us at sales@formpipe.com.

