WEBINAR

From Demo to Decision: A Strategic Approach to Evaluating Community Engagement Platforms

Educational Credit: 0.75 (APA AICP CM)

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Agenda

- **Welcome & Introductions:** Quick hello and housekeeping.
- **Context & Why It Matters:** Avoid buyer's remorse, see beyond flashy demos, and understand long-term considerations.
- **Evaluation Framework - Core Criteria:** How to assess vendors on credibility, trials, support, UX, accessibility, security, scalability, and partnership.
- **RFP & Decision-Making Tips:** Weight priorities, avoid decision paralysis, leverage trials, and understand pricing/procurement.
- **Recap & Key Themes:** Highlight the main takeaways and lessons learned.
- **Poll & Q&A**

Housekeeping

- **Event Timing:** The webinar is scheduled for 45 minutes.
- **Technical Issues:** Please reach out to us at **events@socialpinpoint.com**.
- **Recording and Slides:** Will be emailed to you in the coming days.
- **Introduce Yourself:** Please share your name and organization in the chat.
- **Questions:** Please submit any questions through the Q&A box. By submitting your questions in the Q&A, we can more easily keep track of submissions and make sure we follow up on any unanswered questions at the end of the session.

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Meet Your Hosts

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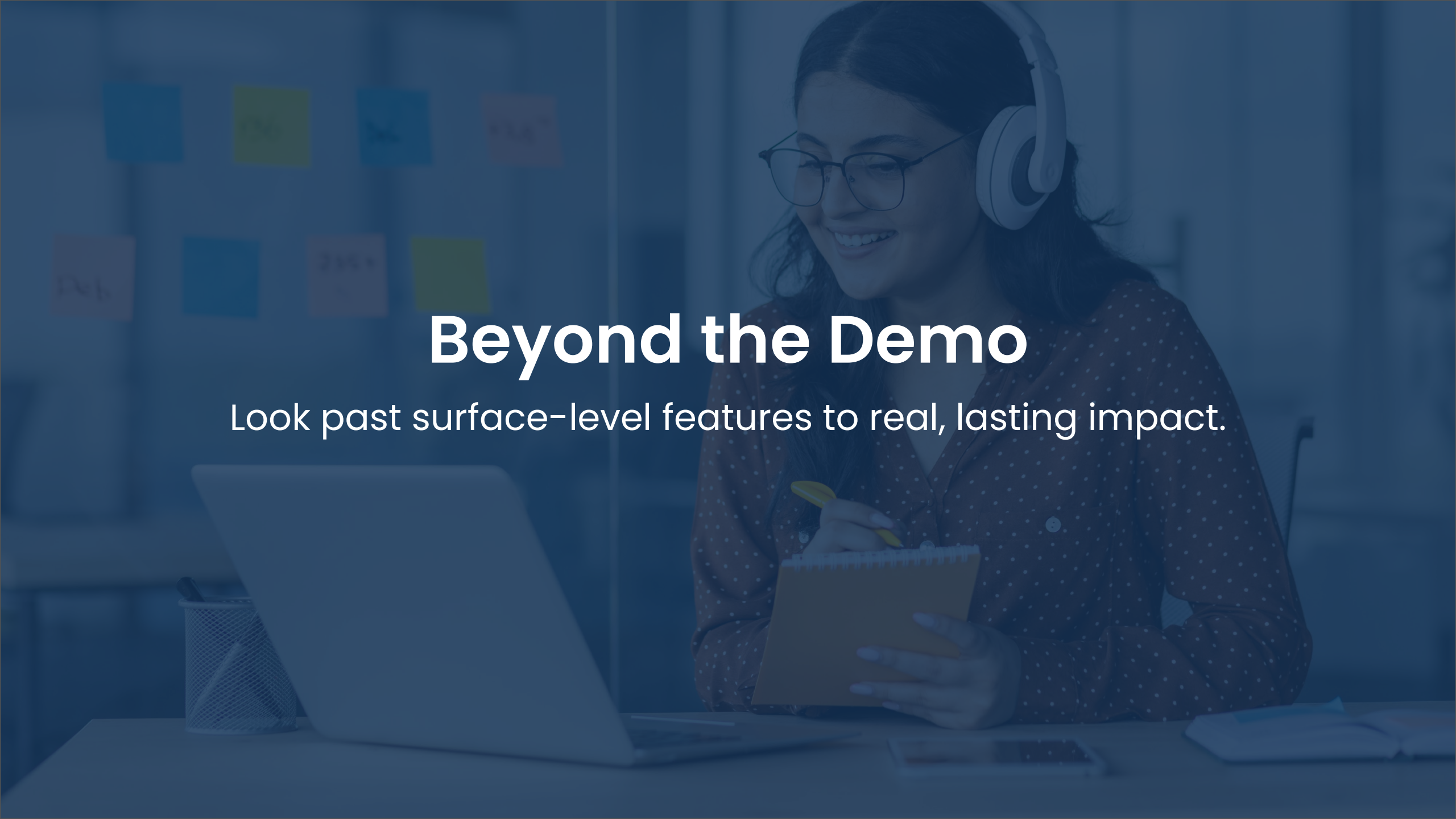

Beyond the Demo

Look past surface-level features to real, lasting impact.

Core Criteria for Evaluation

Key factors to guide your vendor selection and ensure long-term success.

Vendor Credibility

- Seek relevant, recent references aligned with your sector, size, and geography.
- Understand how references were selected — curated for RFP or organic?
- Consider timing/context of reference experience (e.g., post-COVID engagement changes).
- Look for proof of outcomes: measurable results, benchmarks, case studies.
- Evidence of long-term partnerships: renewals, repeat customers, high retention.

Red Flags:

- Vendor refuses direct contact with references.
- References feel irrelevant or are outdated.
- No repeat customers, renewals, or long-term partnership examples.

Trials & Test Environments

- Test the full experience, not just the tool, and evaluate vendor responsiveness and collaboration.
- Evaluate the platform from both the staff/admin perspective and the community/end-user perspective.
- Ensure the trial mirrors real workflows, roles, and integrations, not a curated “showroom” setup.
- Make full use of your trial period.
- Define success criteria and track results during the trial to gather objective feedback.

Red Flags:

- Trial is heavily curated or limited, hiding potential issues.
- Only admin or only community experience can be tested.
- Minimal or no technical/onboarding support during the trial.

Migration, Onboarding, and Ongoing Support

- Migration is more than data transfer — it's about minimizing disruption and ensuring adoption.
- Strong onboarding and support are essential, especially during staff turnover or tech changes.
- Support should include structured onboarding, proactive training, and easy access to help.
- Clarify support channels, response times, and time zone coverage.
- Ensure ongoing guidance and check-ins to help teams succeed post-launch.

Red Flags:

- Onboarding is vague, overly generic, or one-size-fits-all.
- No clear point of contact for implementation, migration, or ongoing support.
- Little focus on change management, adoption strategies, or user training.

Security, Data, and Compliance

- Security is foundational and must meet recognized standards such as SOC 2 or ISO 27001.
- Understand data governance, including storage, access, and retention policies.
- Compliance is critical to meet legal, privacy, and accessibility obligations.
- Check the vendor’s track record, including past incidents and how they were handled.
- Verify awareness and adherence to relevant local regulations.

Red Flags:

- Vendor cannot clearly explain how data is stored or protected.
- No third-party security certifications or reliance on outdated audits.
- Security is treated as optional rather than a required baseline.

Accessibility

- Accessibility is mandatory and a core part of user experience.
- True accessibility goes beyond WCAG checkboxes.
- Accessibility requires ongoing commitment and should be built into the product roadmap.
- Seek independent verification, such as third-party audits or testing.
- Ensure accessibility is integrated across the platform, not just in isolated features.

Red Flags:

- Accessibility is only “on the roadmap” and not implemented.
- No VPAT, audit reports, or real-world examples of accessible design.
- Focus is solely on visual design; functional accessibility is ignored.

User Experience (Internal + External)

- UX matters for both internal teams and external/community users.
- Internal experience should allow drag-and-drop, templates, and easy content creation without IT help.
- External experience should be modern, user-friendly, responsive, and accessible.
- Accessibility and mobile responsiveness are essential components of good UX.
- Customization options and intuitive navigation enhance adoption and efficiency.

Red Flags:

- Platform feels outdated, cluttered, or confusing.
- Admin interface requires extensive training for basic tasks.
- Community or user-facing experience is clunky, inaccessible, or not optimized across platforms.

Scalability and Product Roadmap

- Platform should scale with your organization, handling more users, data, and complexity.
- Vendors should share a clear, transparent product roadmap with upcoming features and improvements.
- Product development should be customer-driven, incorporating real user feedback.
- Evaluate vendor investment in innovation and emerging technologies, like AI or enhanced analytics.
- A healthy roadmap demonstrates long-term vision and readiness for future needs.

Red Flags:

- Long gaps between updates or feature releases.
- Vague or secretive roadmaps with no timelines or details.
- No structured process to collect or act on customer feedback.

Long-Term Partnership

- Choosing a vendor is choosing a long-term partner who supports your success over years.
- Strong post-sale support includes dedicated account managers, help desks, and proactive guidance.
- Training and education through webinars, workshops, and certifications empower your team.
- Vendors that foster community and collaboration encourage shared learning and best practices.
- Proactive communication shows ongoing investment in your growth and engagement success.

Red Flags:

- Limited or no ongoing training, webinars, or educational resources.
- Lack of engagement with customers beyond the initial sale or contract.
- Vendor does not provide regular check-ins or account reviews.

Navigating the RFP Process

Tips for prioritizing needs and navigating RFP decisions smoothly.

Key Considerations to Guide Your Process

Weighting Priorities:

- Identify must-have vs nice-to-have features early to focus on what truly matters for your organization.
- Assign clear weights to evaluation criteria based on organizational goals to make comparisons fair and objective.
- Include pricing thoughtfully so cost is considered without overshadowing overall fit and value.

Avoiding Decision Paralysis:

- Focus on core needs first to avoid getting distracted by every new feature or flashy demo.
- Limit the number of vendors to a manageable shortlist (3–5) to maintain momentum and clarity.
- Set a realistic decision-making timeline to ensure the process moves forward efficiently.

Pricing and Procurement:

- Understand total cost of ownership, including any hidden fees or additional services.
- Look for flexibility in packaging so vendors can tailor solutions to your specific needs.
- Clarify procurement requirements, timelines, and documentation to prevent surprises during contract negotiations.

Recap

- **Focus On the Fundamentals:** Vendor credibility, onboarding/support, accessibility, UX, scalability, etc.
- **Test Before You Buy:** Use trials to evaluate real workflows, internal/admin and community experiences, and vendor responsiveness.
- **Compliance and Security Matter:** Ensure data governance, accessibility, legal, and security requirements are fully met.
- **Prioritize and Weigh Carefully:** Identify must-haves vs nice-to-haves, assign evaluation weights, and involve stakeholders early to avoid decision paralysis.
- **Think Long-Term:** Look for strong post-sale support, proactive communication, training opportunities, and a partner invested in your success.

Questions

Upcoming Webinar

Titans of Community Engagement: Making Meaningful Impact with Limited Resources

Tuesday, September 16
11am PST | 2pm EST (45-minute Duration)
Educational Credit: 0.75 (APA AICP CM)

Key takeaways:

- ✓ Inspiration for scaling engagement without scaling resources
- ✓ Innovative, cost-effective, and time-smart strategies meaningful public engagement
- ✓ Real-world lessons from panelists leading successful projects in DeForest, Squamish, and League City

SAVE YOUR SEAT

THANK YOU

https://planning.org/events/course/9315823/

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