



# How to Talk to Technology Vendors: A Guide for Education Leaders

**When implementing video observations** (or any new education technology) at scale, districts and states need to be able to manage successful relationships with technology vendors. Yet approaching software vendors and asking them to meet a specific need as a layperson isn't always easy. In the case of a coaching platform where teachers can upload a video for a principal's review and comments, or a professional learning platform that allows teacher/peer/coach interactions, finding a vendor that supports your goals and understands your needs is critical. Here are some tips, developed from advice given by Matthew Burton, former Chief Information Officer of the Consumer Financial Protection Bureau and specialist in technology management in the public sector, to help ensure that your technology roll-out is successful.

## STEP 1: PREPARE FOR THE PROCESS

- **Ask yourself:** What is the goal you are trying to accomplish? Write it down in a single sentence. You'll come back to this over time.
- Make a list of everything you want the tool to accomplish and why it's important
  - Prioritize the top 3 features that must be ready when the system launches
  - List 3 additional features that must be available within the first year of use

- **Assign a single internal manager to lead this process.** Assume 50% of their time will be spent on this project for several months. A "committee" of advisors can be helpful, but without a point person coordinating feedback, no one actually feels responsible.

## STEP 2: HOLD EXPLORATORY CONVERSATIONS

- **Ask: How big is your bug list?** What are the biggest bugs? If this list is long (and it's early in the process), this is a GOOD thing. It means your contractor is on top of the project and has worked to identify all of the known issues. You and the vendor can use the list to track how existing and newly identified problems will be resolved before launch.

- **Ask: Do you have test coverage?** Codes are the language of software. Most software providers should have tests for their codes, and you want them to have tested as many codes as possible: aim for 100%. You can also request to watch them test the code. If they aren't willing, get to the heart of why.

- **Ask: What are the biggest security vulnerabilities?** It's not unlikely that you are protecting highly sensitive data—videos of students, student information, teacher or employee data, etc. The vendor should be able to discuss the security features of the platform in detail.

If your contractor or company dodges this question, do follow up. Be especially attentive to their responses. "Our software is secure" is necessarily different from "we are not aware of any problems right now." You may want to ask if they do penetration testing (e.g., someone tries to break through security).

- **Ask: What's your turnaround time for responding to a breach in security?** What steps do you take to secure the data and notify users after a breach? User security should be a top priority for any technology company. If you do not feel confident in a vendor's commitment to your teachers' privacy, you may want to reconsider your partnership.

- **Ask: What support (and maintenance) do you offer after release?** Note that contract work has an end date. If your project was built in-house, you can easily maintain it over time. If it isn't, be sure to work with those who will help maintain the product and its successful use after launch.



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- **Ask yourself: Am I ready to drive?** A common scenario: You come to a meeting prepared with your business requirements and a vision. Suddenly, the technology company decides to demo an off-the-shelf product, and it looks amazing. You are sold! But wait... often technology companies show you the best of their products for a universal user (AKA, not your educators). Keep in mind that this may distract you from the things you need to make your launch a success. You should be prepared to steer the conversation in the direction you want to go.
- **Beware of buzzwords.** No matter your familiarity, don't get sidetracked by jargon (e.g., "agile" and "scrum"). Ask for information in plain English.
- **Ask your vendor: What is your design process like?** Design is not just the look of the final product, it is a research process of what works well for users, what causes difficulty, and what features may be extraneous. Contractors must determine what users

need to make the technology successful. If the product is already designed, ask how it has evolved over time, and how they envision it changing in the short and long term. It is also important to ask how compatible the platform is with other systems. For example, can the observation data be exported to an evaluation tracking that you already use in your district?

- **Once the software platform is built, how will you test it?** It's not enough to try things once before launch; testing should be built into every new release of the platform. Importantly, new features should be easily identifiable, so it's easy for the contractor to identify what's broken.
- **Ask: What do you believe the goal is for this project?** Even if you laid out your goal in an RFP, you want to test how aligned this company is with your project goals and your broader mission. You need to make sure the contractor wants to do more than fulfill the basic terms of the (hypothetical) contract.

## STEP 3: AFTER SELECTION

- **Beware of ambiguous contract language.** Be very clear about custom builds in your contract. Detail each requirement. For example, if you need to receive a data export that provides you with the rubric ratings and evidence tagged from each video observation, be very clear about what you are looking for, your preferred format and file type, and preview the result before implementation.
- **Ask: Can we get someone from the build-team on the call?** Your account manager or contract officer is not your engineer. Contract managers may over-promise what can be delivered. Apparently, they can build anything you may need! In truth, they might not know what is feasible, and may not have insight into development timelines. Before signing a contract, be sure to talk to engineers directly and be clear about what you need, and what the timeline would be to get it. These details should be included in the contract.
- **Engage in the Talk-Write-Check cycle.** After any contract or "build" conversation, write up your understanding, send it back to your vendor for confirmation, and then repeat the cycle until you are convinced that you and the vendor are on the same page. Even after the contract is signed, continue to do this so that you have a paper trail of decisions.



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## STEP 4: GETTING READY FOR LAUNCH

→ **Beware of positivity.** All tech projects have problems. You should feel skeptical if the company or contractor is all rainbows and roses. The first step in launching a product is for the vendor to acknowledge any problems. Doing so, allows you to manage the launch.

→ **Ask: Have you shown this to real people?** Presumably you talked to prior clients of the vendor before drafting a contract, but what about your product? Now that you are about to launch, make sure the contractor hasn't tested it with just one person or one user type.

→ **Ask: What are the biggest risks for not getting our project done on time and within budget?** Make sure that your expectations are realistic for the feature set, release date, and quality requirements that you have. You've likely heard people say that you can only have two of the three desired traits for any project: Good, Fast, and Cheap. If it's fast and cheap, the quality isn't

going to be good (e.g., fast food), but if it's good AND cheap, you may have to wait a while to launch. Make sure you are releasing the minimum viable product that you need and worry about additional feature sets later. Remember that you do not want to release a system that, when updated, requires retraining at scale. The basic skin and navigation should be ready to go upon first launch, and you can add the bells and whistles later

→ **Beware of last minute urgency.** Did you know that each version of the iPhone is frozen for six months before release? If developers are fixing problems right before launch, they are going to come up against an inevitable truism: fixing one thing breaks another. That's not going to play well a week before teachers or school leaders log-in for training. Make sure your software is ready to launch well in advance.

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**Whatever you do, do not worry about being too hands-on.** You are the client and are likely investing a lot of time and money in a product that should protect the safety of your educators and students, and make their experiences teaching and learning easier.