技术评估报告

10. 评估供应商提供的信息

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摘要

远程教育者通常没有培训或经验来完成复杂的技术评估任务。一个可能的劣势领域是理解供应商提供的信息，并有效地与销售、营销和技术代表进行沟通。客观和全面的产品评估需要选择信息，并有时生成信息来帮助这一过程。如果评估者知道该询问什么以及期望供应商提供什么，供应商可能会同意提供额外的信息，包括直接体验其产品。

引言

在评估潜在的远程交付和支持技术时，研究人员可能需要使用供应商提供的信息。历史上，教育，特别是远程教育，被大多数主要的技术开发者和提供者视为利基市场；然而，随着教育技术投资的增加，以及私人部门的培训，更多的教育资源正在被定向到推广各种距离学习应用。

供应商对他们的产品、服务和成就的推广和公开信息为远程教育者提供了挑战和机会，让他们做出明智的技术选择。因为远程教育者通常不是技术复杂且昂贵的系统的主要购买者，而且他们通常对市场营销和销售领域的常见做法并不了解，一些警告和探索可能有助于获得可靠信息来支持选择过程可能有帮助。虽然提供了一些警告，但可以给那些缺乏市场或采购经验的人提供一些理解，从而在更平等的基础上与专业的销售人员和市场营销人员进行互动。

在评估技术的适用性的同时，评估者必须考虑组织的准备程度来成功地将新技术纳入组织。

作者根据Welsch（2002）的建议，提醒评估者，所有种类的创新都会在任何组织中遇到财务、结构和文化方面的挑战，因此在组织准备采用新技术时，必须做出评估。评估者的任务包括考虑技术对组织的潜在使用价值，以及评估组织准备采用新技术的准备程度。
technology successfully. A mismatch between corporate readiness and the technology’s demands as an innovation could be disastrous for an unprepared organization.

Assumptions and Strategies for Evaluators

A key assumption in the following discussion is that vendor-supplied information can be used effectively in evaluating a technology, if the potential purchaser understands in advance some facts, and, where strategically appropriate, engages in some timely activities.

1. Truth vs. the whole truth in vendor publications. While there should be no misinformation, vendor-supplied information is almost never complete. Vendors know they are not on the witness stand, and they therefore do not feel they have to tell the “whole truth.” (They may be following St. Paul’s insightful advice to the citizens of Corinth: “All things that are true for me may not be expedient.”)

- It is not reasonable to expect vendors to provide complete, objective information on their own products; the evaluator must seek comparative information and evaluative data (caveat emptor).
- The evaluator should also be prepared, if doubtful of any claims, to challenge vendors to prove them (see 2, 3, 4 and 6, below.)

2. Real vs. ideal performance reports. Similar to the above, information provided in marketing and sales publications commonly highlights only the strengths of the products and the company, usually in a non-technical sense, often in comparison with known weaknesses of the competition, and sometimes referring to performance under laboratory (rather than “real-world”) conditions of use.

- Marketing and sales information should be regarded with caution, even scepticism, until corroborated by independent testing.
- Objective technical information should be sought, to replace merely qualitative or comparative product descriptions.

3. Access to technical information. Related to the above point, evaluators should be able to access quality, objective information from a vendor, consulting, as necessary, appropriate internal and external expert sources. Technical specifications include credible engineering information describing the performance or requirements of the technology under controlled conditions.

- Technical specifications should reflect benchmark checks, or should be referenced to externally recognized standards, where applicable.
- The evolutionary history of specifications and performance of a product should be made available, so evaluators can see how the product’s functionality has evolved.
- “Next release,” or otherwise promised future features, should not be mentioned unless they actually exist, and may be evaluated in some form.

4. Reference-site information. Reference sites are customers of the vendor who know (and presumably are happy with) the product, and who are also regarded by the vendor as using the product intelligently, effectively and appropriately. Reference sites can be regarded as demonstrating the most effective potential outcomes likely achievable with the product.
• Evaluators should have access to a choice of reference sites. Vendors should assist potential purchasers in selecting reference sites to contact or visit.
• Reference sites who are partners of the vendor, who have a financial interest in the product, or who derive any financial reward from referrals should not be used without disclosure of these facts.
• After purchase, users of a product who provide the vendor with valuable feedback, especially feedback leading to product refinements or development of new products with commercial potential, should receive some benefit, especially if student, staff or faculty assistance contributed significantly to the enhancements. Evaluators should seek advantages for the organization when partnering with a vendor to improve the vendor’s product.

5. Business facts. Information about the company itself, as a corporation, can sometimes show how well managed and accepted the company and its products are in its field. This information is usually only readily available on public companies, which by law must make public certain information about their business dealings. While information on public companies should be entirely accurate (federal regulations apply), the data may be difficult to interpret, and may also be incomplete.

• Company size and reputation may indicate corporate health, and ability to deliver ongoing product support and services. (Reference sites may be a better source of this information; see 4, above.)
• Despite the potential difficulties in acquiring and evaluating it, information about the size of a company, the location of its offices (potentially important for support considerations), its technical history, its pattern of growth (market share, product acceptance), and its product plans may be useful in assessing corporate health and “fit” with the potential purchaser’s intentions.
• Quarterly and annual reports of public companies should be available for perusal.

6. The right to pilot-test. Because the acquisition of complex technologies, often unfamiliar in the organization, represents both a major investment and a high risk, the opportunity to pilot-test the product may be of value to some purchasers.

• Vendors should approve “no-obligation” pilot-tests, and assist the potential purchaser with orientation, installation and other associated tasks. Tests should be of sufficient length, should be conducted under conditions of experimental rigour, and should correspond well enough to actual conditions of use, that results are likely to reflect closely actual program performance. (No surprises should occur after purchase, for want of testing before.)
• An agreement about costs related to testing should be reached before the pilot commences; for ethical reasons, the vendor’s direct costs should normally be borne by the potential purchaser, to assure impartiality in the evaluation.
• Use and publication of the results of pilot- or evaluative tests should be agreed upon in advance of any pilot-testing.

7. Price and support stability. Sales practices in relation to technologies often change as marketing opportunities and products evolve; in some companies, these may also change if sales representatives need to book revenue at the end of a quarter or a fiscal year. To potential
purchasers, frequent changes in product packaging or in sales strategies may lead to questions about the product or the company itself.

- Pricing should be quoted with no hidden or deferred costs, and should permit perpetual use by the purchaser of the version purchased, including any ongoing necessary product support. (Educational customers do not normally have resources for annual renewals of licenses, or mandatory upgrade fees.)
- No product should normally be “orphaned” by the vendor. While the product ages, it should continue to be fully supported, even if it is “obsolete” in relation to more current versions.
- If an older version of a product eventually becomes embarrassing to the company, or too expensive to support, the vendor should make an appropriate upgrade possible within the resources of the purchaser. (The principle is that the vendor incurs a moral responsibility to each educational purchaser to maintain product integrity so long as the user is satisfied with and is using the product.)

Conclusions

Vendors competing for business in the highly competitive and often financially lean, even distressed, distance education marketplace, provide product information of different kinds in a variety of forms. As well, the volume and intensity of these kinds of representations may be considerable: marketing and sales expenditures in relation to educational technologies, especially of software products, may comprise a major part of the cost of doing business, sometimes significantly in excess of the cost of the product itself. For example, in 2001, PLATO Learning Inc. reported that its costs for “selling, general and administrative expenses” had increased 30 percent, to 63 percent of revenue, up from 61 percent of revenue in 2000; in 2000, the increase had been 29 percent. Bearing in mind that PLATO is a mature company, with established products and customer based, and therefore less in need of core development and support expenditures, for the same two years “product development and customer support” comprised 11.3 percent and 12.4 percent of revenue, respectively.

Evaluators should know how to judiciously assess and use vendor-provided material, including knowing when to ask for more or different kinds of information. Gathering needed product and organizational data, generating new data where necessary, and helping colleagues see how the data relate to intended outcomes, are core tasks of the technology evaluation process in a training or educational environment. Because of the long-term organizational implications, the evaluation and selection process must generate an accurate and realistic description both of the technologies’ capabilities and of potential impacts on the organization. Vendors may legitimately help in this process if their role and contributions are properly managed by the evaluator.

References


This series of software evaluation reports will continue with reviews of other online collaborative tools.

N.B. Owing to the speed with which Web addresses are changed, the online references cited in this report may be outdated. They can be checked at the Athabasca University software evaluation site: cde.athabascau.ca/softeval/. Italicised product names in this report can be assumed to be registered trademarks.

JPB. Series Editor, Technical Notes