

# ***Vendor Evaluation Checklist***

**The following checklist can be used to evaluate the experience of potential vendors.**

- Does the vendor have experience in conversion for your specific product type [trade book, magazine, journal, textbook, etc.]?
- Does the vendor have experience in conversion for your specific subject area [poetry, mathematics, foreign language, etc.]?
- How long has the vendor been providing conversion services?
- Request and verify a vendor's references. Ask each reference if they are willing to provide the following information:
  - 1) Number of titles/pages completed.
  - 2) Timeframe in which the above volume was completed.
  - 3) Product type/subject area included in conversion.
  - 4) Quality of conversion work on a scale of 1 to 5, where 1 is poor and 5 is excellent.
  - 5) Quality of vendor's project management on a scale of 1 to 5, where 1 is poor and 5 is excellent.
  - 6) Satisfaction with the vendor's communication on a scale of 1 to 5, where 1 is poor and 5 is excellent.
  - 7) Overall satisfaction with work produced on a scale of 1 to 5, where 1 is poor and 5 is excellent.
  - 8) Would you work with this vendor again? If not, please explain.
  - 9) Pain points, if any, in working with this vendor.
  - 10) Other applicable comments.

# *Is Offshore an Option?*

- What is the cost differential between onshore and offshore?
- Which team is better matched to the experience you require?
- Will working with a team in another time zone create an obstacle? If yes, is the offshore vendor willing to form a team working parallel hours with your team? What can you do internally to mitigate this issue?
- Is your internal team non-English speaking? Will this pose a problem with offshoring? For instance, if your team is most fluent in Russian, are they comfortable enough with English or the native language of your offshore vendor to overcome this obstacle?
- Is it necessary for a native speaker or subject matter expert to convert some of your content? [This could be true should content decisions be necessary that involve knowledge of local customs or practices or colloquialisms.] If so, would a hybrid approach with offshore and onshore conversion meet this specific need?
- If onshore vendors seem better suited to meet your needs but you require offshore pricing, is it possible to start onshore and then transition work offshore as a vendor gains more experience with your product?
- Are you satisfied with the working conditions [cleanliness, safety, etc.] for both onshore and offshore vendors? This can be difficult to ascertain without an onsite visit, but for many companies this can be an important factor in work placement decisions.
- Is travel to your vendor necessary? [For onsite training, etc.] If so, does your budget allow for the travel expenses required for traveling to offshore vendor locations?
- Does the vendor have all of the necessary liability and other insurance in place to meet your needs legally?

# Conversion Pricing Models

*Conversion pricing models can be confusing. Use the following information as a guide in determining which model is right for your project.*

## **Per Seat**

Pricing a project per seat—per physical person working on the other end—is quite common in conversion, software development, and call center projects. You will most likely have the option of paying for a set number of seats, or taggers, on a monthly basis. The per-seat cost could be based upon a maximum volume, but is generally not decreased should your volume fall lower than anticipated. Experienced conversion vendors should be able to examine both your content and the volume at hand and calculate the number of seats required to complete your project within your desired timeframe. However, should the project not progress as planned [perhaps because source files do not flow as quickly as you planned] you could get burned with this pricing model. The advantage is that your monthly invoices will be predictable and easy to plan for.

## **Per Kilobyte [KB]**

The number of kilobytes, bytes, or bits is an effective way to measure the units of your information. However, unless you have highly predictable content where the average number of characters per book or per page can be easily translated to these units of measurement, this pricing model can be difficult to plan for.

## **Per Page**

For most publishers the number of pages in your content repository is known or easily obtainable. Your per-page costs will be determined based upon the type of work required for your conversion project, including schedule and content complexity. This is the pricing model that can be most easily planned for when putting together a budget. Be sure that the conversion vendors from whom you request pricing have been provided with an appropriate sampling of content in order to perform the detailed analysis necessary for accurate per-page pricing estimates.

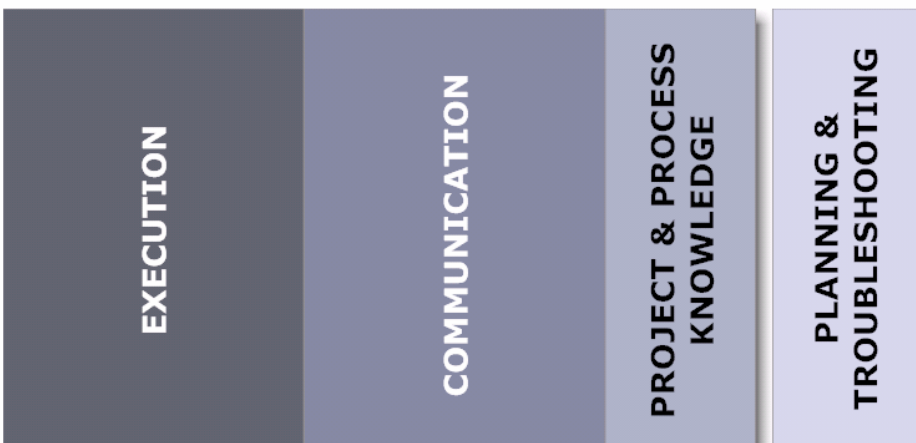
# ***The Backlist Project Team Checklist***

- 1) Identify functional area involvement & staffing requirements
  - Identify functional areas to include & determine team size
  - Discuss project goals to build consensus & gain support
  - Establish expectations & roles
- 2) Staffing considerations
  - Is staff dedicated to this project only?
  - Will volume of work be reasonable?
  - Are expectations clear?
  - Did you build consensus for this initiative?
  - Are appropriate technical resources available?
- 3) Make project management decisions
  - Do you need a project management team, or is a single project manager sufficient for the scope of your project?
  - Is an experienced project manager available?
  - If not, can your budget bear the expense of hiring an external project manager?
  - Will an external project manager be as engaged and feel as accountable to your project as an internal member of your staff?
  - If an internal project manager is chosen, will that individual be dedicated to this project?
  - If not, will you encounter time allocation or workload concerns?
- 4) Choose a vendor[s]
  - Onshore vs. offshore?
  - Evaluate their experience
  - Define training requirements
  - Choose the number of vendors required based upon:
    - Schedule requirements
    - Consistency/quality considerations with multiple vendors
    - Managing & tracking multiple vendors
  - Test/pilot potential vendors !!!

# Planning for a Successful Project Manager

Regardless of the project management choices you do make, be sure to engage your project manager as early in the process as possible. *Ensure the following statements are true:*

- Your project manager is involved in early project decisions.
- Your project manager believes—really believes—in the project.
- Your project manager finds the project plan and goals to be reasonable and attainable.
- Your project manager is able to build consensus with other members of the team and key stakeholders.
- Your project manager is able to clearly articulate the goals of the project to others.
- Your project manager understands the process and the product.
- Your project manager is a skilled troubleshooter and problem solver.
- Your project manager is a master communicator.
- Your project manager is able to execute a plan and inspire others in their own execution.



*A project manager should possess strengths in all four of these critical areas. While planning and troubleshooting are areas of typical focus, both execution & communication are actually much more pertinent to a project's success.*