CASE STUDY

FINANCIAL SERVICES

Intelligent Technology Selection Management

SelectHub

Executive Summary

> **"This platform (SelectHub) is very easy to use and intuitive. SelectHub has thought of everything and will literally help us make a quantum leap in the evaluation and selection of technology. What used to take us 4 weeks can now be done in 2 days!"**
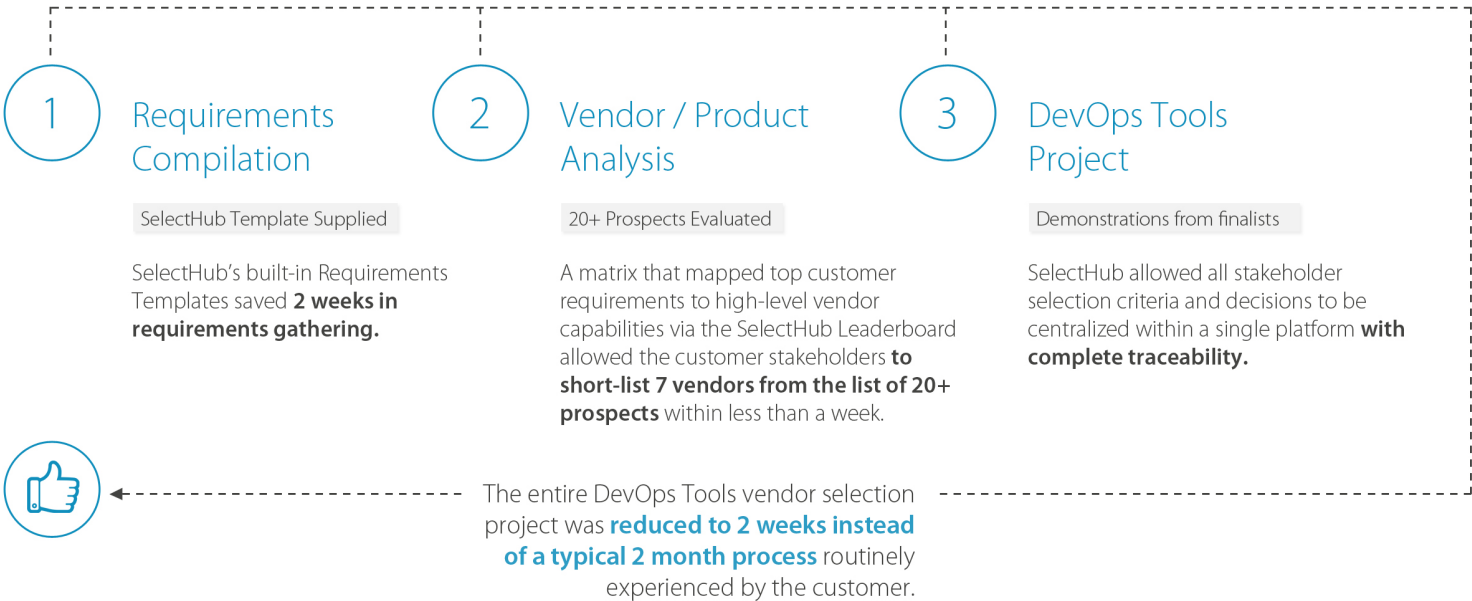>
> Sourcing Manager

A public financial services company uses SelectHub for managing all their IT selection processes including:

• Requirements compilation and prioritization across various internal stakeholders

• Vendor / product / services analysis and comparisons

• Requesting demos and proof-of-concepts

Challenge

Evaluation and selection of a DevOps Automation Tool to improve release planning, governance and compliance, and streamline inefficient release automation and code deployments.

Results

1 Requirements Compilation

SelectHub Template Supplied

SelectHub's built-in Requirements Templates saved **2 weeks in requirements gathering.**

2 Vendor / Product Analysis

20+ Prospects Evaluated

A matrix that mapped top customer requirements to high-level vendor capabilities via the SelectHub Leaderboard allowed the customer stakeholders **to short-list 7 vendors from the list of 20+ prospects** within less than a week.

3 DevOps Tools Project

Demonstrations from finalists

SelectHub allowed all stakeholder selection criteria and decisions to be centralized within a single platform **with complete traceability.**

The entire DevOps Tools vendor selection project was **reduced to 2 weeks instead of a typical 2 month process** routinely experienced by the customer.

Customer profile

A leading financial services company based in Carmel, IN, serves more than 4 million middle-income working Americans and retirees. They have more than 50 million potential customer households across America in their target market, and the projected growth of their market year-on-year is in double digits. They offer financial products to customers at home and at the worksite through independent insurance agents and their associates' marketing arm.

Business / Technical Background

The customer was in the process of initiating a new software evaluation project for faster code deployment / release automation (DevOps Automation) tool for their multiple engineering teams. Their releases would sometimes go on for several days as they had an extremely cumbersome, manual process for deploying their application code and managing downstream dependencies.

Some of their top requirements included:

• Enabling a reliable and repeatable code release process
• Application release automation and dependency reconciliation
• Enabling continuous delivery (CD)
• Centralizing release operations
• Establishing a robust release approval Workflow

SelectHub's Role in the Technology Selection Management Process

The customer used the SelectHub cloud-based platform to manage the DevOps software selection process. This comprised gathering a formal set of requirements, especially taking the above high-level categories to more granular line-items from various highly technical internal stakeholders, guiding them through the various product / service options, organizing product demos and allowing quantitative scoring of various vendor capabilities towards the final selection.

User Onboarding and Training

Two types of users were trained on the SelectHub platform:

• **Basic Users:** This comprised a 60 minute training session for these users covering topics such as how to enter their requirements, how to choose specific requirements from a SelectHub template, how to access a vendor / product scorecard, how to shortlist vendors, how to request demos and how to compare, rate and rank vendor capabilities.

• **Advanced Users:** This comprised an additional 30 minute training session on how to set up users and roles within SelectHub, how to create and publish requirements templates specific to their organization (for reusing certain requirements from one project to another) and how to onboard and initiate vendor interactions (based on roles).

SelectHub's Value Addition

SelectHub offered a prescriptive workflow to manage the entire vendor selection process resulting in:
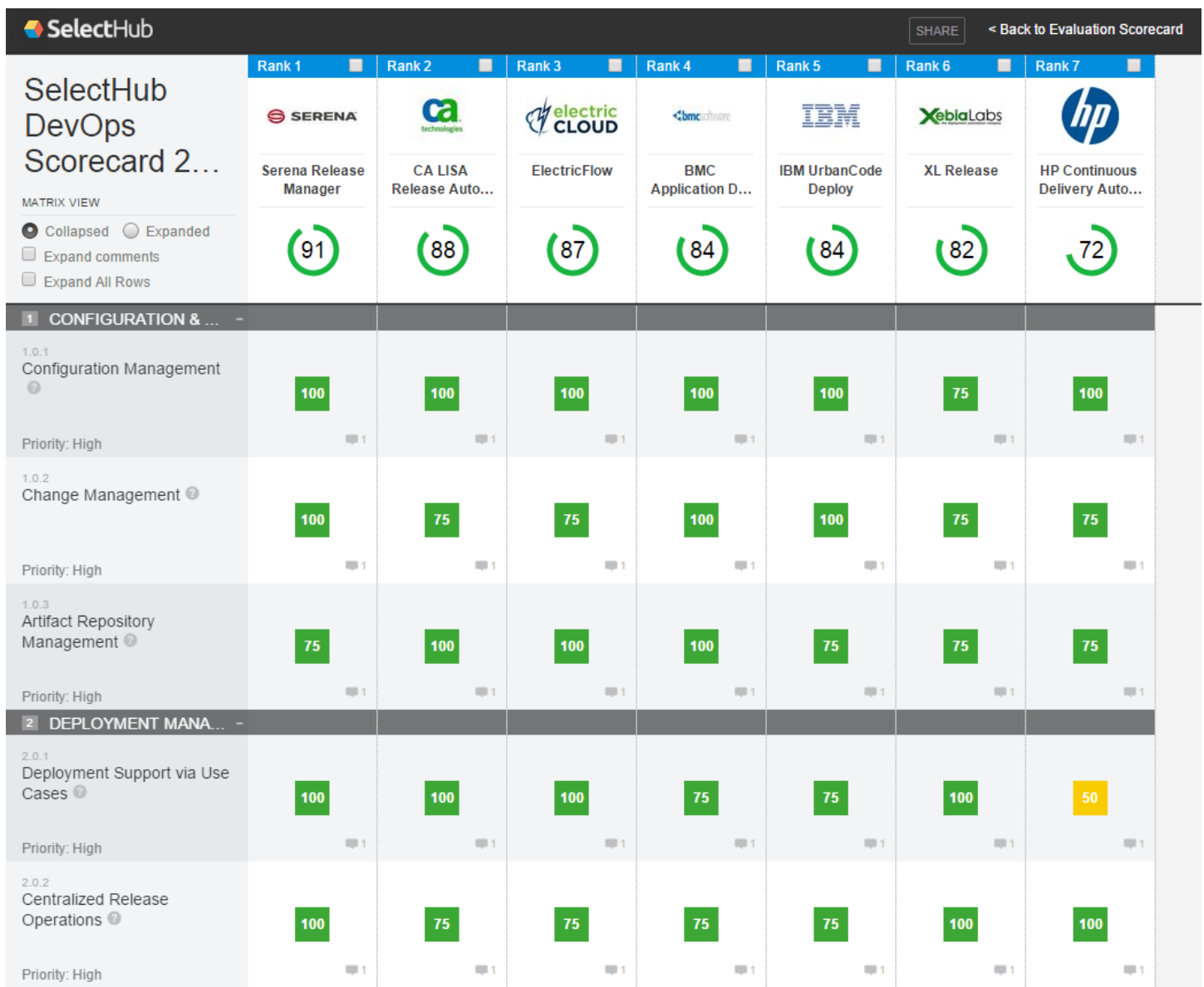
1. Accelerated product and vendor evaluation timelines by 50%

2. Reduced the amount of manual research by well over 50% and helped customer stakeholders make a more informed decision

3. SelectHub supplemented the customer's access to industry analyst reports (primarily Gartner) by providing granular and more actionable scorecards that did an apples-to-apples comparison by matching the customer's key requirements to the top vendors in the DevOps Automation space.

4. SelectHub reduced the amount of paperwork in the form of emails, Excel spreadsheets and Word documents by over 90%.

5. Ensured that all internal stakeholders were kept on the same page throughout the process, while creating an automated audit trail of the entire evaluation process and reducing future liability.

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	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5	Rank 6	Rank 7
SelectHub DevOps Scorecard 2...	SERENA	ca technologies	electric CLOUD	bmc software	IBM	XebiaLabs	hp
	Serena Release Manager	CA LISA Release Auto...	ElectricFlow	BMC Application D...	IBM UrbanCode Deploy	XL Release	HP Continuous Delivery Auto...
MATRIX VIEW	91	88	87	84	84	82	72
● Collapsed ○ Expanded							
☐ Expand comments							
☐ Expand All Rows							
1 CONFIGURATION & ... –							
1.0.1 Configuration Management ⑦ Priority: High	100 ▢1	100 ▢1	100 ▢1	100 ▢1	100 ▢1	75 ▢1	100 ▢1
1.0.2 Change Management ⑦ Priority: High	100 ▢1	75 ▢1	75 ▢1	100 ▢1	100 ▢1	75 ▢1	75 ▢1
1.0.3 Artifact Repository Management ⑦ Priority: High	75 ▢1	100 ▢1	100 ▢1	100 ▢1	75 ▢1	75 ▢1	75 ▢1
2 DEPLOYMENT MANA... –							
2.0.1 Deployment Support via Use Cases ⑦ Priority: High	100 ▢1	100 ▢1	100 ▢1	75 ▢1	75 ▢1	100 ▢1	50 ▢1
2.0.2 Centralized Release Operations ⑦ Priority: High	100 ▢1	75 ▢1	75 ▢1	75 ▢1	75 ▢1	100 ▢1	100 ▢1

"The SelectHub Support team provided a lot of timely assistance in spite of our internal delays. The built-in Scorecard was useful. We got access to some best practices via the SelectHub workflow and we are ahead of schedule. I will definitely recommend using SelectHub for all our selection projects."

Senior Director, Release Management

Summary

1. SelectHub's Requirements Templates saved over 4 weeks of stakeholder time during the requirements gathering phase.

2. SelectHub's Vendor Scorecard / Leaderboard matrix helped reduce 20+ candidate vendors to a shortlist of 7 within a week, giving the customer's highly technical staff members a solid foundation to base their analysis on.

3. The overall evaluation timeframe was reduced to 2 weeks instead of the 2-month process routinely experienced by the company.

Intelligent Technology Selection Management

SelectHub's online platform allows you to make smarter, faster technology selections at a lower cost.

The SelectHub technology selection management platform provides collaborative requirements management and vendor evaluations as part of a guided best practice workflow for the entire selection process going from requirements compilation to vendor shortlists, and finally to RFx processes—greatly reducing time and errors—and allowing all participants to contribute efficiently.

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