

# Assessing and Selecting Digital Partners: A Framework

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## A DCG INSIGHT BRIEF

### Introduction


Historically, organizations have invested a great deal of time and effort in selecting the right business application – and paid little attention to selecting the partner charged with implementing and integrating the product. In our experience, this is a huge mistake. It is no doubt one of the reasons that so many companies are dissatisfied with their implementations, or deem them outright failures.

With the transition from product-centric buying (“I need a CRM system”) to solution buying (“I need to support my customers more effectively”), software products are more numerous, the integrations between them more complex, and the overall business challenges more daunting. In this context, the role of the digital partner necessarily increases – and the likelihood of achieving success without the right partners approaches zero.

### Selection Challenges: Find a Consistent, and Consistently Good, Partner

The challenge of finding the right agency, systems integrator, or consultancy should not be underestimated. Unlike software vendors, digital partners do not offer the same standard “product” to each client. In principle, each customer receives a distinct project team with its own unique assembly of backgrounds and collective expertise, varying capabilities, a tailored project structure and approach, and so forth. Such disparities are inevitable when dealing with a “product” composed of people, each with his or her own passions, personality, knowledge, and skill set.

People-centric, skills-based services are hard to “demo” in a selection process, so buyers must be extremely diligent in order to evaluate the



digital partner effectively. Given the potential for variability among project teams, the challenge for buyers is to find a partner that is consistent – and consistently good. Lines of questioning on topics such as the following are especially revealing:

- Internal knowledge sharing
- Mentorship practices
- Project methodologies and processes
- Account and project staffing
- Internal training and education
- Communications principles

Of course, there are some similarities between buying a technology and selecting a digital partner to implement it. Above all, both processes should begin with thorough introspection by the buyer in order to identify their organization’s strategy, in-house capabilities (skills and technologies), future plans, and much more. The aim is to determine a comprehensive set of needs (at DCG we speak of “focal needs”), prioritize them, and transform them into a set of capabilities required from the digital partner.

The capabilities may be technical (“Should have experience integrating XYZ with SharePoint”), skill-oriented (“Must be adept with developing corporate taxonomies”), or fairly general (“Must

have a strong portfolio of creative site designs”), but nonetheless the list should be documented and agreed to by the stakeholders. This set of capabilities should become a prime thrust of the selection process.

## Reference Interviews Are Key

A key (and most often overlooked) element of the assessment process is the reference interviews. At Digital Clarity Group, we believe that discussions with past or existing clients are imperative. Reference clients are the only reliable source of insight into how the digital partner performs “in the wild.” Be sure to request numerous references – for individual team members, from customers facing similar circumstances, and even from projects that “failed” or faced serious challenges. Needless to say, the candidate partner should not participate in, or “sit in” on, these conversations.

(Lining up reference calls is the bane of every vendor or digital partner’s existence. There is little value for the person taking the call. But reference interviews are such a valuable source of information that, in our view, you should refuse to work with a firm who cannot provide multiple references. For the same reason, you should be willing to provide a reference for your partner’s future prospects.)

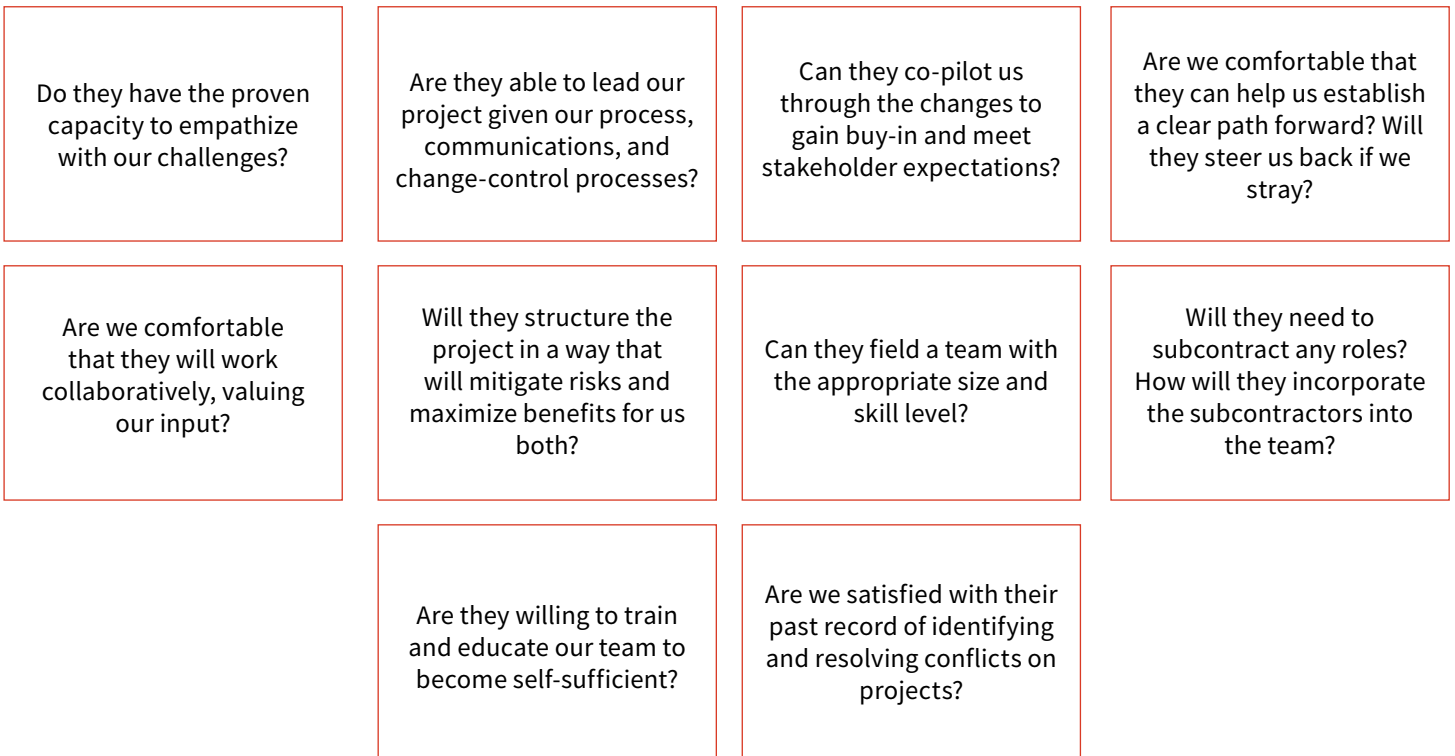
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## Assessment Considerations for a Successful Project

As noted, buyers should determine the mix of skills and experience required of the digital partner by identifying their own needs first. These required capabilities comprise the primary portion of the evaluation criteria. Additionally, the questions in Figure 1 should lead the selection team throughout the assessment process.

Keeping these questions top of mind while assessing digital partners, and using them throughout the project as checkpoints on how well the selected digital partner is delivering against the project's objectives and requirements, will help to ensure a successful project and long-term working relationship.

Figure 1  
**What You Need to Ask About Potential Digital Partners**





## Conclusion: Finding a Good Fit

In addition to finding a digital partner that performs consistently and has the right capabilities for the project at hand, finding one with the right “fit” is critical. When a partnership fits – or doesn’t – it is obvious, often immediately. Therefore, a digital partner that will work well with the company’s culture and that can establish the necessary trust with the project team should never be undervalued. Organizations need to understand very clearly how the digital partner will work with internal IT teams and evaluate accordingly.

Remember that the questions and advice provided in this report are drawn from our many years working with buyers to select the right technology vendors and digital partners. Consider them a set of best practices to follow diligently.

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# About Digital Clarity Group



Digital Clarity Group (DCG) is a research and advisory firm that helps organizations deliver world-class customer experience through partnerships with best-fit technology vendors and digital partners. DCG enables client success by bringing unprecedented transparency to selecting, engaging, and optimizing relationships with digital partners and technology vendors. Its guidance draws on its proprietary data about agency and integrator partner performance, its deep experience with vendor and digital partner selections, and the market expertise of its industry analysts who cover technologies for managing customer experiences. DCG delivers on its mission through its VOCalis customer satisfaction assessment program, its vendor and digital partner selection services, and Partner Finder, a free resource that buyers use to identify qualified digital partners based on key criteria.

Digital Clarity Group serves clients across the ecosystem for customer experience solutions. DCG helps enterprise buyers of services and technologies engage with the optimal set of partners for their digital transformation and customer experience initiatives. DCG helps digital agencies and integrators align their client portfolios with their strongest capabilities and competencies, leading to higher levels of customer satisfaction, repeat business, and performance-based differentiation. DCG helps technology vendors optimize their channel partner programs for successful implementations that deliver sustainable value to customers.

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